



The OSCARnet V2.0 User Guide

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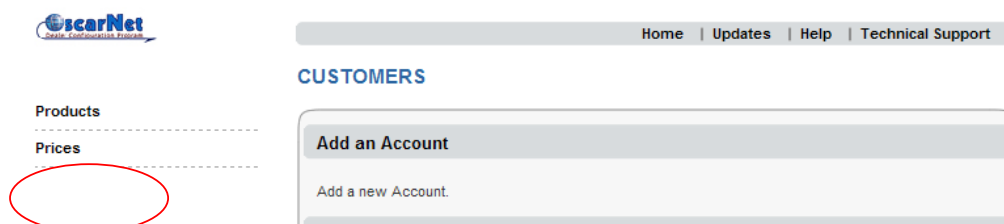
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Customers

This section describes how your OSCARnet customers are set up and maintained. (Customers being the Consumer or End-User). Many of the options available could potentially require a large amount of data input and therefore such data can be uploaded. The following sections describe how a customer is set up manually.

Summary Tab

Figure 1 Customer Maintenance tab



Add Account

Select 'Customer', then 'Add Account'. You will then see this screen

Figure 2 Customer Account Set-up

When setting up a new customer, the details to be entered are: -

- Account Number (Reference) – This is the account number that the customer will use when logging on
- Account Name – The full customer name for your clarity

- Account Group – You can put certain accounts in certain groups e.g. if 5 accounts have the same set up details
- Financial Year Start - This decides the start date from which the annual Spend/Budget reports start from (these are displayed to the consumer as an option on the navigation bar). When setting up a new account, the default will be the current month and year.

Authorisation

This selection determines whether this particular account uses 'Order Authorisations'. If this is set to 'None' then all users will be able to send orders. If set to 'All Orders' then every order, regardless of who places it, requires authorisation.

The 'E-mail Authorisation' check box indicates whether the authorisation requests for these account are automatically e-mailed. See user authorisation levels below.

The 'Super Authoriser Permission' allows for a 3 tier process. e.g. a user places an order, it then goes to the Supervisor to check and amend if necessary and then sent to the main authoriser to authorise the order.

Payment Method

You can determine the accounts payment method here. Selecting or deselecting 'Charge Credit Card' or 'Charge Account' makes these options unavailable/available to all of the accounts users in the check out screen.

Orders Legend

Minimum Order Value – This can be used to ensure delivery of an order is cost effective, e.g. a consumer places an order to be delivered to a location hundreds of miles away from the Dealer, but the value of the order is only £5.

If this is set then any order placed for this account must have a value higher or equal to the value set in this box. A user will not be able to complete their order if the minimum order value has not been reached; a message will appear informing them of this.

If no minimum order value is entered, then no restriction will apply.

Minimum order values can also be assigned at cost centre and user level. Any minimum order value set within an account at these levels will overwrite a value set at account level.

Mandatory Parcel – Checking the mandatory parcel label box ensures that an account user must enter text for a parcel label, or they will not be able to complete their order.

Apply Order Acknowledgement – Selecting this generates an email acknowledgement every time a user places an order. This is sent to the user who has placed the order; it confirms the details of each order line, the delivery charge/type and the PO number. It also determines what format you want your customer to receive their acknowledgements. Using the 'HTML' option gives you the ability to add logos and use HTML to change fonts and add colour. The 'text' option will be a plain text acknowledgement, and by selecting 'none', the customer will not receive anything.

E-mail Orders To – Whilst most of the fields are self-explanatory, **the e-mail field can have a direct impact on how your system operates.**

Should you choose to have your OSCARnet orders transmitted via e-mail, then it is this e-mail address that the orders will be sent to. E-mail is also used as a back-up in the case of a failure to transmit to your Dealer system.

It is therefore very important that this e-mail address be populated.

Receive Copy of Acknowledgement – The dealer will receive a copy of all the acknowledgements of orders placed if this box is ticked.

- **SPICERlinkweb Settings** – Orders can be sent directly from OSCARnet into SPICERlinkweb. The account number, branch code and order type must also be populated in Order Transfer if this option is selected.
- **Delivery Charge** – This allows you to apply a delivery charge profile to this account. (Please see the section on 'Delivery Charges' for more detail).
 - **Standard Delivery Mechanism** – Displays your standard delivery charge.
 - **Multiple Deliveries** – Displays your timed deliveries (if created), giving the end user an option to select.

After an account has been created, it is no longer possible to edit the 'Reference,' due to the possibility of orders being placed on that account. Order history demands that details are not deleted from OSCARnet.

Prices and Display Options Tab

Price and VAT Display Options

This option controls what all of this account's users see when viewing a product. Figures 4 and 5 will demonstrate.

Figure 4 Without

Product Code	Pack Size	Your Price	No. of Packs	Add to Basket
00215X	10	£ 12.68	<input type="text" value="1"/>	

Figure 5 With

Product Code	Pack Size	Your Price	Price Incl VAT	VAT Amount	No. of Packs	Add to Basket
00215X	10	£ 12.68	£ 14.90	£ 2.22	<input type="text" value="1"/>	

Display Options

This option controls what all of this account's users see when viewing a product. You can choose to have RRP, Saving, Page Number showing or not showing.

Figure 6

DISPLAY OPTIONS

Show List Price ☐ Yes

Show Discounts ☐ Yes

Show Page Number ☐ Yes

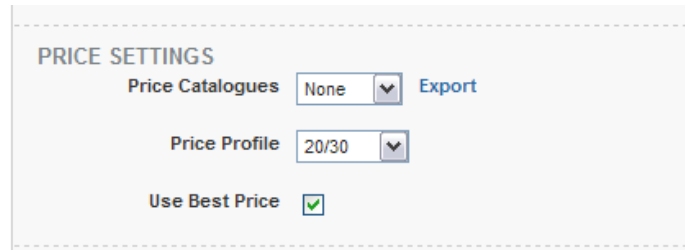
Show Price Graphic ☐ Yes

Select Discount Display Format

Compare	Product Code	Pack Size	R.R.P. per Pack	Price	Saving	Stock	No. of Packs	Update Order
<input type="checkbox"/>	181818	1	£ 18.55	Contract Price £ 5.00	73%	No Data	<input type="text" value="1"/>	

Price Settings

Here you can assign a discount price profile, net price file and choose to have OSCARnet allow individual accounts to only see the best (lowest) price for a product no matter what the source of the price is.



PRICE SETTINGS

Price Catalogues None Export

Price Profile 20/30

Use Best Price ☒

If the show 'Best Price' option is selected, then OSCARnet will disregard the pricing algorithm that is standard, and will look through all of the prices for a particular product and display the lowest price to the end user.

Mailers

Any mailer which you subscribe to, will be listed here for you to select for each Account.

Quantity Breaks

The customer will be able to view any breaks that have been set up on a product, if these are selected.

Special Offers

The customer will be able to view all the Special Offers, if these are selected.

Settings Tab

Consumer Settings

Enable Front End Account Maintenance – If selected, a user can change various options on the front end, e.g. add and edit cost centres, add and edit addresses or add and edit users.

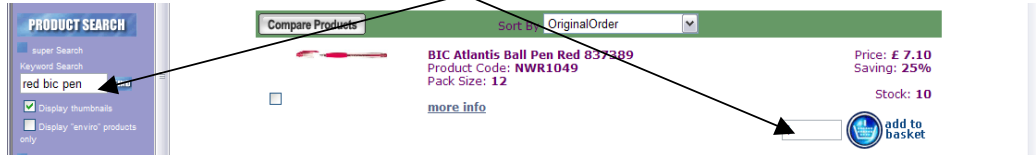
Create Address – If selected a user can create a manual address on the front end.

Product Suggestions Available – The product suggestions feature is applied on a per consumer account basis. If you wish to allow any account users to view the suggestions select the 'Except some contacts' link and select which users of this account will be prompted with alternatives. (It is possible to select and deselect all users). Save this page. Once you return to the main Customer Accounts page tick the 'Product suggestions available' check box and save. The users selected will now be able to view any product suggestions set up.

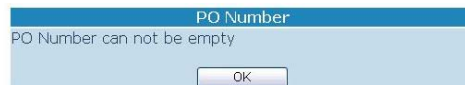
Enable Customer Product Sorting – If selected, the customer can use the sort option to sort by;



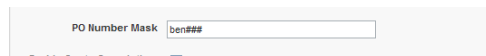
Order Products From the Search Results Page – When a keyword search is returned, the customer can order from the results listed



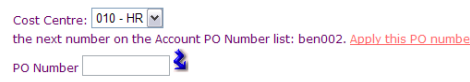
Compulsory Purchase Order Number – When selected the customer will be prompted to enter an Order Number, when they leave it blank. The system does not generate a purchase order number automatically as before. If the customer tries to proceed to the checkout without entering one, they will get the error message:



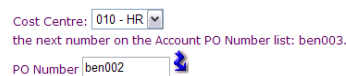
PO Number Mask - You can now set OSCARnet so it automatically populates your customers' orders with their own purchase order reference format.



Ben### is entered into the field. # - represents the number e.g. ben001.



It will ask if you wish to apply the PO number.



When applied the PO number is populated.

Enable Quote Completion Prompting - OSCARnet Pro only. When a customer adds a product to their shopping basket, a quote is created. This will prompt your customer when they log in to the site if they have an outstanding quote, and ask if they would like to complete it now.

If there is only one quote, the message asks if they would like to continue the quote – if they click to continue, they are taken to the shopping basket with the quote applied.

If there is more than one quote, they have the option to view the “Recent Quotes” page.

This message is only displayed if: the waiting quotes were placed by that user, that user has permission to view their own quotes or that user has permission to complete quotes into orders

The messages can be changed on the “Welcome” page of Edit Text in Design-Control.

Enable Return Creation – The user will have permission to raise returns.

Request a Price Option - Any product that is not part of the default Price Catalogue (if there is one) or is not contract priced will not display a price. In place of the price is a hyperlink that generates an e-mail, this contains a request for a price for this product.

Apply Cost Centre Per Order Line - This option allows your customer to add a different cost centre for each order line.

STOCK DISPLAY SETTINGS

Your customers can now view stock availability.

Stock Display Type – You can choose to have a red or green symbol (Traffic Lights) or the stock in numbers

Warehouse – You will need to decide which warehouse you would like stock to be shown for. Only 1 warehouse can be selected.

Spicers Account Number – Your account number must be entered here.

Customer Image

This facility allows you to upload a logo which an account user will see when they first log in to your OSCARnet site. To add or change a logo, click the browse button to search for a file, or enter the file path. Images can be in .gif or .jpg format. Click the 'Change Consumer Logo' button to apply the image. If you wish to delete a logo without replacing it, click the 'Delete Consumer Logo' button.

Any changes to a customer logo will be applied even if you do not click the Save button at the bottom of the Customer Accounts page.

Consumer Welcome Text

You can use this to add account specific welcome text that a user will see when they log in. Type the text into the box on the left, and then click the 'View Preview' button to see how the text will look on your site. This text is HTML editable. To remove the text completely, click the 'Reset Text' button. To save the text click 'Save Changes'. If you click this the text will be saved whether or not you click the 'Save' button for the whole Customer Accounts page.

Warehouse: Birmingham (41)

Spicers Account Number: 3133605

CUSTOMER IMAGE

Enter Filename: [Browse...](#)

[Change Consumer Logo](#) [Delete Consumer Logo](#)

No Customer Image

CONSUMER WELCOME TEXT

[Reset Text](#) [View Preview](#)

There is no welcome text for this account.

[Save](#)

The 'Save' button should then be selected to save the changes

Addresses

On entry to this page, the form is empty – allowing you to enter a new address record. At the top of this form is a 'Show Address List' this shows all previously created addresses for this account, from which you can select an address to edit or deactivate.

Products

Prices

Customers

- Add Account
- Manage Accounts
- Account Details
- Addresses
- Cost Centres
- Users
- Requisition Pads
- Budget Control
- Returns
- Copy Account
- Contract Prices
- Customer Volume Breaks
- Customer Code Conversion
- Permission Groups
- Customer Groups

Data Upload

Exports

Your Account

Edit Site

Banners

ADDRESSES

Account Number **DB1970**

Add/Edit the details of the address below.

[Show Address List](#) [Add Address](#)

ADDRESS DETAILS

Address Ref

Address

Post Code

Delivery Charge:

This address is using the default delivery charge

Telephone

Fax Number

Creation Date: 06/06/2008 00:00:00

Address Active: ☒ Yes ☐ No

Include for All Users: ☐ Yes ☐ No

Done

Each address can be assigned its own Delivery Charge Profile. This means that if a user selects this address its default Delivery Charge Profile replaces the accounts default Address Ref

Every address should be given a reference. This is because, when uploading users, addresses are assigned to users by their reference.

Address

Enter up to five address lines here.

Post Code

OSCARnet cannot validate the postcode. It may however cause problems during the full ordering process if this is invalid.

Phone

This number is for your reference only.

Fax

This number is for your reference only.

Address Active

This determines whether the address is used by this account. The main purpose of this function is to switch addresses off if they ever become redundant.

NOTE: This option is only available *after* an address has been set up. The default is that the address is active immediately after input.

It is not possible to switch off an address if...

It is the default of a user *or* assigned to a cost centre. A warning message will appear advising you how many users/cost centres it is associated with.

Include for all users

This determines when a user is created whether the address is automatically assigned to the user.

Cost Centres

To input a new cost centre, the cost centre code and the description must be input. The option to enter a cost centre mask is also available. Include/exclude user assignment also.

COST CENTRES

Account Number DB1970

Edit the details of the cost centre below.

COST CENTER DETAILS

New Cost Centre *

SA1

Description *

SALES

PO Number Mask

SA#####

☒ Active

☐ Inactive

INCLUDE TYPE

☒ Include Cost Centres for all users

☐ Do not include Cost Centres for all users

* means mandatory

Once you click 'SAVE' you get the option to go into the next relevant pages.

Account Number DB1970

Confirmation

Thank you

Go To Pages

Show Cost Centre List

Edit Cost Centre Details

Assign Address

Edit Budget

Edit Budget Levels

Show cost centre list – Lists all the cost centres

Edit Cost Centre Details – Amend or delete cost centre details

Assign Address – Link a cost centre to an address. Select the relevant cost centre then click 'change address'

	Address	Ref	Phone
<input checked="" type="radio"/>	Ladywood, The Mews	1	07909 535 402

Change Address

Edit Budget – Amend budget details.

Using the 'Edit Budget' link, a budget can be set for each cost centre if required. For help with budget control go to the budget control page of this manual.

Minimum Order Value - This can be used to ensure delivery of an order is cost effective, e.g. a consumer places an order to be delivered to a location hundreds of miles away from the Dealer, but the value of the order is only £5. To set a minimum order value for a cost, enter an amount and click 'Update'. If an amount is inserted here then any order placed on this cost centre must have a value higher or equal to the value set in the box. A user will not be able to complete their order if the minimum order value has not been reached, a message will appear informing them of this. If no minimum order value is entered here, then no restriction will apply. Minimum order values can also be assigned at account and user level. A minimum order value assigned to a cost centre will overwrite any value set up at account level but **not** a user minimum order value.

Edit Budget Levels – Amend budget levels once they have been created

The screenshot shows a web form titled "ANNUAL BUDGET". At the top, there is a field for "Annual Budget" with a value of "1000.00" and a red asterisk indicating it is mandatory. Below this is a section titled "BUDGET LEVELS". It contains a "Time period" dropdown menu with a "Break" button next to it. A message states "No one budget level existed for" followed by a list of options: Weekly, Monthly, Quarterly, and Yearly. Below this is a section titled "LEVEL DETAILS". It includes "From" and "to" date pickers (From: 01 June 2008, to: 31 August 2008) and a "Value" field with "300.00". A "Save Level" button is at the bottom of this section. A red asterisk at the bottom left indicates "* means mandatory".

Users

As with addresses, any users already set up for this account will be listed when you click on the users link. You can quickly filter out which users have what permissions by using the permission group drop down box. For more details, please refer to the Permission Groups Page. To amend the user details, simply select the user you wish to work with, and then click 'Use Contact' when setting up a new user, the following fields require input

The screenshot shows a web form titled "CONTACT INFORMATION" for "Account Number DB1970". It has three tabs: "Summary", "Web Access", and "Orders & Budget Control". The "Summary" tab is active. The form is divided into three sections: "NAME", "CONTACT DETAILS", and "COST CENTRES". The "NAME" section has fields for "Title", "First Name" (mandatory), and "Surname" (mandatory). The "CONTACT DETAILS" section has fields for "Phone", "Extension", "Fax", "Mobile", "Email", "Address Name" (mandatory), and "Job Title". The "COST CENTRES" section has two radio buttons: "Allow this contact to see Cost Centres" (selected) and "Do not allow contact to see Cost Centres". A red asterisk at the bottom left indicates "* means mandatory".

Name

Three fields are to be input here. Full names are listed on reports. The 'First Name' field is displayed in the welcome when a user logs in.

Contact Details

These fields are mainly for reference. The two exceptions are the E-mail and the Address Name fields. The e-mail address is used with the OSCARnet front end with regard to Order Authorisations. (This is described later in this section.) The 'Address Name' field determines the default delivery address.

NOTE: This becomes irrelevant if Cost Centres and addresses have been linked. The address will then be determined by the default Cost Centre for this user.

Cost Centres

When you are first adding a user you will see a toggle which allows you to select one of two options. If you select 'Allow this contact to see Cost Centres' they will be able to order on all cost centres for that account,

To only allow the user to order on the default cost centre, select the option 'Do not allow contact to see Cost Centres'.

Web Access

The screenshot shows the 'Web Access' tab selected. It contains the following fields: 'User Name' with an asterisk, 'Password' with an asterisk, 'Permission Group' with a dropdown menu set to 'Ungrouped', and 'User Active' with an unchecked checkbox. A red asterisk with the text '* means mandatory' is at the bottom left. A 'Show Contact List' link is at the top right, and a 'Save Contact Details' button is at the bottom right.

The user name and password determines how this user logs onto the site. **The User Active check box MUST BE TICKED** to allow log in. This check in effect switches off a user. (Again, it is not possible to delete a user because of the reporting history) You can assign a user to a Permission group here.

Orders & Budget Controls

The screenshot shows the 'Orders & Budget Control' tab selected. It contains two sections: 'BUDGET CONTROL' with fields for 'Maximum Order Value' and 'Maximum Line Value' (the latter has a help icon), and 'PAYMENT DETAILS' with fields for 'Cost Centre' and 'Invoice Address' (marked with an asterisk). A red asterisk with the text '* means mandatory' is at the bottom left. A 'Show Contact List' link is at the top right, and a 'Save Contact Details' button is at the bottom right.

Budget Control

Please see Budget Control section.

Payment Details

Here a cost centre or cost centres can be assigned to a user.

An invoice address must also be assigned to a user.

Once 'Save Contact Details' is clicked, more options then become available

ACTION IF LINE VALUE EXCEEDED

- ☒ Block Order Line
- ☐ Warn Order Line
- ☐ Authorisation Order Line

ACTION IF ORDER VALUE EXCEEDED

- ☒ Block Order
- ☐ Warn Order
- ☐ Authorisation Order

BUDGET REPORT

- ☒ No Budget Report
- ☐ View all Budgets
- ☐ View Budget for my cost centres only

PAYMENT DETAILS

Cost Centre: SA1 (SALES) Restrict

Invoice Address: Ladywood (1)

CATALOGUES HELP ME!

Authorisation Restriction: None

Order Restriction: None

View Restriction: None

MINIMUM ORDER VALUE

Minimum Order Value:

TEMPLATES

Restrict Ordering To ReqPad Only: ☐

There are no templates for this account

Budget Control

See 'Budget Control' section.

Catalogues

The upload routines allow for the upload of mini-catalogues. Selecting one of these imposes restrictions on which products a user can order from. The three options are:

Authorisation Restriction

The user can order any product code. If, however, any of the products are NOT contained within the selected mini-catalogue, the whole order will need to be authorised.

Order Restriction

The user can only order products that are contained within the selected mini-catalogue.

View Restriction

The user can only see the products contained within the selected mini-catalogue.

Minimum Order Value

This can be used to ensure delivery of an order is cost effective, e.g. a consumer places an order to be delivered to a location hundreds of miles away from the Dealer, but the value of the order is only £5.

To set a minimum order value for a user, enter an amount in the box and save the user details.

If an amount is inserted here then any order placed by this user must have a value higher or equal to the value set in the box. A user will not be able to complete their order if the minimum order value has not been reached; a message will appear informing them of this. If no minimum order value is entered, then no restriction will apply.

A minimum order value assigned to a user will overwrite any value set up at account level or cost centre level.

Template

A user can be assigned one or more templates. If 'Restrict order to Req pad only' is selected the user will only be able to view those product and only order those products on the assigned template.

Requisition Pads

Requisition Pads (or) Order templates are built here. Enter the template name and choose 'Apply all' if you wish to assign the template to all users.

TEMPLATE NAME

Account Number DB1970

Create a new requisition pad for this account by entering a name for it below.

[Show Templates List](#)

NEW TEMPLATE

Template Name *

Apply To All ☒

* means mandatory

Once the template name has been created you have the option to edit the name once it's been saved.

You can start adding products to your template. Once the product has been added, click on the product and here you can assign a header. If the relevant header does not exist then go to 'Manage Headers' to enter a new header and assign it to the relevant product.

Select Header Instruction

Product Code 29748X

Template Header

You also have the option to copy an existing template over onto your new template. You can then delete or add more product codes to the new template.

Template name Formula 2

If you know the code of the product you want to find, enter it into the box below.

Product Code

[Change Template Products Order](#) | [Manage Headers](#) | [Show Templates List](#) | [Select Product](#)

Below is a list of products currently in this requisition pad.

❗ The requisition pad is currently empty for this customer.

You can copy from an existing Requisition Pad

Account Number

Template Name

Once you've completed your template you may want to change the order in which the products display in this requisition pad. This can be done by going into 'Change Template Products Order', clicking onto the product and dragging them to their new position.

You can also upload order templates, including headers, for help on this see the Upload section of this manual. When you upload a header, you can upload an existing header for a product, or create a new one by inserting a header that does not yet exist.

Budget Control

Here you can create a budget for an account and break it down by weeks, months or quarters. Also, you can choose how to react when the budget is exceeded.

CUSTOMER BUDGET

Account Number **DB1970**

Create a budget for this account and break it by weeks, months or quarters. Also choose how to react when the budget is exceeded.

[Edit Budget Levels](#)

CUSTOMER BUDGET DETAILS

Maximum Order Value

Maximum Line Value

ACTIONS

ACTION IF LINE VALUE EXCEEDED

☒ Block Order Line

☐ Warn Order Line

☐ Authorisation Order Line

ACTION IF ORDER VALUE EXCEEDED

☒ Block Order

☐ Warn Order

☐ Authorisation Order

ACTION IF BUDGET EXCEEDED

☒ Block Order

☐ Warn Order

☐ Authorisation Order

Maximum Values

The spend on any order can be restricted in two ways. These are as follows:

Maximum Order Value

Should a value be entered, this will apply a maximum spend for any individual order placed by any user of this account. For example, a figure of 1000 will apply a restriction on any user of this account placing an order over £1000. The restriction comes in three forms – block, warn and authorise.

Maximum Line Value

This applies a restriction to the maximum that can be spent in any single order line within an order. Again the restriction has three forms.

NB// Both of these options (if set) will apply to EVERY user of this account

It is also possible to apply these limits at an individual user level – Budget Control by User. The 'Update' button at the bottom of the screen must be selected to save any values you have populated.

Annual Budgets

Two options are required to apply an annual budget.

Annual Budget (amount)

This field should be populated with the total budget for the year.

Time Period

This determines how the Figure entered as the annual budget is balanced over the year. There are four choices. These are

- Weekly
- Monthly
- Quarterly
- Yearly

After choosing a period, the 'Break' button should be selected, this will separate the value across this time period. This is displayed at the bottom of the screen as follows. (The example shown is a monthly break).

The screenshot shows a web interface for setting an annual budget. At the top, there's a section titled 'ANNUAL BUDGET' with a field 'Annual Budget *' containing the value '1,000.00'. Below this is a section titled 'BUDGET LEVELS' with a 'Time period' dropdown set to 'Monthly' and a 'Break' button. A table lists budget levels with columns 'From', 'to', 'Value', and 'Previous Year'. The table shows monthly intervals from June 2008 to May 2009, with values ranging from £82.00 to £85.00. Below the table is a 'LEVEL DETAILS' section with 'From' and 'to' date pickers, a 'Value' input field, and a 'Save Level' button. A red asterisk indicates that the 'Value' field is mandatory. At the bottom right, there is an 'Update' button.

From	to	Value	Previous Year
Sunday, June 01, 2008	Monday, June 30, 2008	£ 82.00	
Tuesday, July 01, 2008	Thursday, July 31, 2008	£ 85.00	
Friday, August 01, 2008	Sunday, August 31, 2008	£ 85.00	
Monday, September 01, 2008	Tuesday, September 30, 2008	£ 82.00	
Wednesday, October 01, 2008	Friday, October 31, 2008	£ 85.00	
Saturday, November 01, 2008	Sunday, November 30, 2008	£ 82.00	
Monday, December 01, 2008	Wednesday, December 31, 2008	£ 85.00	
Thursday, January 01, 2009	Saturday, January 31, 2009	£ 85.00	
Sunday, February 01, 2009	Saturday, February 28, 2009	£ 77.00	
Sunday, March 01, 2009	Tuesday, March 31, 2009	£ 85.00	
Wednesday, April 01, 2009	Thursday, April 30, 2009	£ 82.00	
Friday, May 01, 2009	Sunday, May 31, 2009	£ 85.00	

Click on any date to amend it. It will appear in the 'Level Details'. As well as the pre-set time periods, this option also allows you to set any period you wish.

Exceeding Account Budgets

The following options can be applied.

CUSTOMER BUDGET DETAILS	
Maximum Order Value	<input type="text" value="100,000.00"/>
Maximum Line Value	<input type="text" value="50.00"/>
ACTIONS	
ACTION IF LINE VALUE EXCEEDED	
<input checked="" type="radio"/>	Block Order Line
<input type="radio"/>	Warn Order Line
<input type="radio"/>	Authorisation Order Line
ACTION IF ORDER VALUE EXCEEDED	
<input checked="" type="radio"/>	Block Order
<input type="radio"/>	Warn Order
<input type="radio"/>	Authorisation Order
ACTION IF BUDGET EXCEEDED	
<input checked="" type="radio"/>	Block Order
<input type="radio"/>	Warn Order
<input type="radio"/>	Authorisation Order

NOTE: These options apply to *every user* in the account.

Action If Order Line Value Exceeded

This states what must happen if you exceed the line values you have set. The three options are:

- Block Order Line (do not allow this limit to be exceeded)
- Warn Order Line (Warn the user if they are over the limit – but allow them still to proceed)
- Authorise Order Line (The user can continue but is warned that the order must be authorised.)

Any order that requires authorisation (because of budget reasons) can only be authorised by users who have the 'Authorise Budget' option selected in the Users screen.

Action if Order Value Exceeded

This states what must happen if you exceed the order value. The three options are:

- Block Order Value (do not allow this limit to be exceeded)
- Warn Order Value (Warn the user if they are over the limit – but allow them still to proceed)
- Authorise Order (The user can continue but is warned that the order must be authorised.)

Action if Budget Exceeded

This states what must happen if you exceed the Annual budget. The actual budget limit depends on how that budget has been split across the year.

A budget of £12,000 has been split monthly giving an average budget of £1000 per month. This will force an action once £1000 (in a month) has been reached. OSCARnet will *not* wait until (£1000 x 12 months = £12,000) has been exceeded. It is therefore impossible, in this example, to spend a whole year's budget in one month.

The three options are

- Block Order (do not allow this limit to be exceeded)
- Warn Order (Warn the user if they are over the limit – but allow them still to proceed)
- Authorise Order (The user can continue but is warned that the order must be authorised.)

Any order that requires authorisation (because of budget reasons) can only be authorised by users who have the 'Authorise Budget' option selected in the Users screen.

Budget Control by Cost Centre

This section can be found in Customers/Cost Centres

The screenshot shows the 'COST CENTRES' interface. At the top, it says 'Account Number DB1970'. Below that, it says 'Edit the details of the cost centre below.' There are two links: 'Show Cost Centre List' and 'Assign Address', with the latter circled in red. Below the links is a 'COST CENTER DETAILS' section. It includes 'Cost Centre Ref SA1', 'Description * SALES' (highlighted in yellow), and 'PO Number Mask SA####'. There are radio buttons for 'Active' (selected) and 'Inactive'. A red asterisk note at the bottom says '* means mandatory'.

Applying Cost Centre Budgets

Selecting the 'edit budget levels' button presents the following screen.

The screenshot shows the 'ANNUAL BUDGET' interface. At the top, it says 'Annual Budget * 100,000.00'. Below that is the 'BUDGET LEVELS' section. It has a 'Time period' dropdown menu and a 'Break' button. A message says 'No one budget level existed for'. Below that is the 'LEVEL DETAILS' section. It has 'From' and 'to' dropdown menus, a 'Value' input field, and a 'Save Level' button. A red asterisk note at the bottom says '* means mandatory'. The 'Break List' button is highlighted.

Cost Centre Annual Budgets

This section can be found in Customer/Cost Centres/Edit Budget Levels

Two options are required to apply an annual budget for the selected cost centre: -

Annual Budget (amount)

This field should be populated with the total budget for the year.

Time Period

This determines how the Figure entered as the annual budget is balanced over the year. There are four choices: -

- Weekly
- Monthly
- Quarterly
- Yearly

The option to apply custom time periods is also available.

Exceeding Cost Centre Annual Budgets

This works as described in Exceeding Account Budgets This budget however is for this cost centre – not for the whole account.

NOTE: It is not possible for the combined cost centre budgets to exceed the annual budget (If an annual budget has been applied)

Budget Control by User

This section can be found In Customers/Users/Orders & Budget Control

Maximum Values

The spend value on any order can be restricted in two ways: -

Maximum Order Value

Should a value be entered, this will apply a maximum spend for any individual order placed by this user. For example, a Figure of 1000 will apply a restriction on any user of this account placing an order over £1000. The restriction comes in three forms – block, warn and authorise.

Maximum Line Value

This applies a restriction to the maximum that can be spent in any one order line within an order. Again the restriction has three forms.

Exceeding User Budgets

The following options can be applied.

Action if line value exceeded

This states what must happen if you exceed the line value set in section. The three options are:

- Block Order Line (do not allow this limit to be exceeded)
- Warn Order Line (Warn the user if they are over the limit – but allow them still to proceed)
- Authorise Order Line (The user can continue but is warned that the order must be authorised.)

Any order that requires authorisation (because of budget reasons) can only be authorised by users who have the 'Authorise Budget' option selected in the Users screen.

Action if order value exceeded

This states what must happen if you exceed the order value. The three options are:

- Block Order Value (do not allow this limit to be exceeded)
- Warn Order Value (Warn the user if they are over the limit – but allow them still to proceed)
- Authorise Order (The user can continue but is warned that the order must be authorised.)

Any order that requires authorisation (because of budget reasons) can only be authorised by users who have the 'Authorise Budget' option selected in the Users screen.

Authorise Budget

This option is only applicable when a restriction of 'Authorise Order' has been applied to any of the budgets described in this document. (That is when exceeding a budget requires authorisation)

Only users who have this option selected have the ability to authorise such orders. It works in the two following ways.

Account does not Use Authorisations

In Customer Maintenance, the Account screen allows you to apply authorisations 'All Orders or None' to an account. The budget authorisation option, if selected, will still happen even if authorisations are set to 'None'.

Account uses Authorisation

All usual authorisation rules will apply and order above budget incorporated. For example, if a user can only authorise for cost centre 1 and have the privilege to authorise orders above budget, they only authorise orders above budget for cost centre 1.

View Budget Report

This option determines whether this user can view the budget report detailed in Budget Report.

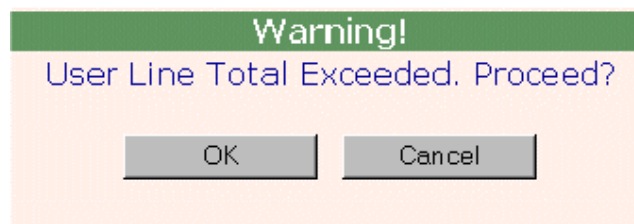
Front End Changes

If budgets have been applied to an account, cost centre etc. then there are some changes noticeable to the user when budget limits are exceeded. These are explained as follows.

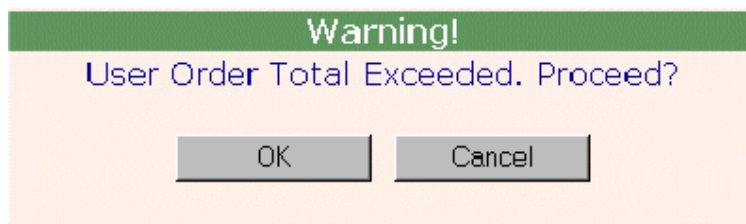
Warning Authorise Excess of Line/Order Value

Users are given the following displays if excess of budget for line/order value has been set to 'Warn' or 'Authorise'

Warn that line value has been exceeded



Warn that the order value has been exceed



Block Excess of Line/Order Value

The following line is displayed at the top of the shopping basket. Any block prevents the user from continuing until the value is reduced.

Figure 9 Block Order if line value exceeded

Cost Centre:

PO Number:

User Line Total Exceeded.

Details of Order number 380								
Overall saving 4.7%								
Product Code	Description	Page	Pack Size	Pack Price	Saving	No of Packs	Line Total	Remove from Basket
524563	Brother T76 Fax Digital Answering Machine 14400bps 10pp ADF 54 Speed Dials Ref FaxT76		1	£ 189.00		20	£ 3,780.00	—
b25470	Plus Fabric Press Seal Wallet White Envelopes DL [Pack 500]	302A	1	£ 20.69	33.3%	20	£ 413.80	—
Sub Total							£ 4,193.80	
Delivery							£ 0.00	
Vat							£ 72.42	
Total							£ 4,266.22	

[checkout now](#)

The message 'User Order Total Exceeded' will be displayed in the event of an order value being exceeded.

Block Excess of Budget

The following line is displayed if a budget is exceeded.

Figure 10 Blocking Excess of budget

Cost Centre:

PO Number:

Accounts Monthly Budget Total Exceeded.

Details of Order number 384								
Overall saving 33.3%								
Product Code	Description	Page	Pack Size	Pack Price	Saving	No of Packs	Line Total	Remove from Basket
b25470	Plus Fabric Press Seal Wallet White Envelopes DL [Pack 500]	302A	1	£ 20.69	33.3%	2000	£ 41,380.00	—
Sub Total							£ 41,380.00	
Delivery							£ 0.00	
Vat							£ 7,241.58	
Total							£ 48,621.58	

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[Home](#) | [Special Offers](#) | [Contact Us](#)

The message will indicate which budget (cost centre or account) has been exceeded.

Budget Report

This report will show the budget assigned to an account and/or cost centre.

Budget Report

Period	Budgeted Amount	Actual Spend	Last Year Spend
Customer Account: paul01			
01/01/2000 - 31/01/2000	£ 10,164.00	£ 0.00	
01/02/2000 - 29/02/2000	£ 9,508.00	£ 0.00	
01/03/2000 - 31/03/2000	£ 10,164.00	£ 0.00	
01/04/2000 - 30/04/2000	£ 9,836.00	£ 84.22	
01/05/2000 - 31/05/2000	£ 10,164.00	£ 10.00	
01/06/2000 - 30/06/2000	£ 9,836.00	£ 0.00	
01/07/2000 - 31/07/2000	£ 10,164.00	£ 8.78	
01/08/2000 - 31/08/2000	£ 10,164.00	£ 0.00	
01/09/2000 - 30/09/2000	£ 9,836.00	£ 305.89	
01/10/2000 - 31/10/2000	£ 10,164.00	£ 18.92	
01/11/2000 - 30/11/2000	£ 9,836.00	£ 0.45	
01/12/2000 - 31/12/2000	£ 10,164.00	£ 0.00	
Cost Centre: 000/000 - test 2			
01/01/2000 - 31/12/2000		£ 0.00	
Cost Centre: 050/123 - test cost centre			
01/01/2000 - 31/03/2000	£ 4,973.00	£ 0.00	
01/04/2000 - 30/06/2000	£ 4,972.00	£ 7.50	
01/07/2000 - 30/09/2000	£ 5,028.00	£ 4.50	
01/10/2000 - 31/12/2000	£ 5,027.00	£ 19.37	

Any excess of a budget will appear in **RED**.

Editable Text

There are two areas of text that can be edited using the Edit Text tab in Design-Control. The page is titled 'Prompt' and allows the following two fields to be edited.

Prompt Warn Line

You can edit this text: -

"You have exceeded the order line limit. Proceed?"

Prompt Warn Order

The following text can be edited

"You have exceeded the order limit. Proceed?"

Returns

When a return is made you can enter this information into OSCARnet, and the spend reports for the relevant account will be changed accordingly.

Returns tab

The screenshot shows the OSCARnet web application interface. On the left is a navigation menu with categories: Products, Prices, Customers (with sub-items like Add Account, Manage Accounts, Account Details, Addresses, Cost Centres, Users, Requisition Pads, Budget Control, Returns, Copy Account, Contract Prices, Customer Volume Breaks, Customer Code Conversion, Permission Groups, and Customer Groups), Data Upload, Exports, Your Account, Edit Site, and Banners. The main content area is titled 'RETURNS' and 'Account Number Admin'. It contains a search section with two input fields: 'OSCARnet Order Number' and 'Purchase Order Number', each with a 'Find' button. Below the search section is a 'Spend by Order Calendar for Impact Office Equipment Ltd' table. The table has columns for months from Oct to Sep and rows for PO (Purchase Order) and CC (Cost Centre).

Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
PO	PO	PO	PO	PO	PO	PO	PO	PO	PO	PO	PO
CC	CC	CC	CC	CC	CC	CC	CC	CC	CC	CC	CC

Searching for an order

First you will need to find the order which contains the product(s) to be returned. There are several ways of doing this.

To search by OSCARnet Order number, enter the number in the appropriate box on the Returns tab (see above) and click the 'Find' button. (Carriage return will also trigger this button). The relevant order will appear in the bottom half of the screen.

In the same way you can search by purchase order number using the second box.

An order can also be found by selecting the purchase order numbers or cost centre orders for a known month on the 'Returns' tab. This works in a similar way to the 'Spend by Order' report on your site.

Raising a new Return

Order Viewed in a Returns Tab

SEARCH BY
OSCARnet Order Number Find
Purchase Order Number empty Find

DELIVERYADDRESS Ladywood
The Mews
B19 6ES

INVOICEADDRESS Ladywood
The Mews
B19 6ES

##ParcelLabel##
##Cost Centre Label## PO Number: Empty
Details of Order number: 67
Overall saving: 59.8%

Product Code	Description	Quantity	Price
<input type="checkbox"/> 181818	Concord CD6 Telephone Index Book Binder with Matching A-Z Index and 20 Sheets A5 Black Ref 83010 Page: 64D Pack Size: 1 Reference	Quantity: 1 Returned: 0 Recent: <input type="text"/>	Pack: £ 3.69 Savings: 80.1% Line: £ 3.69
<input type="checkbox"/> 00215X [lpp01]	Tipp-Ex Rapid Correction Fluid Fast-drying with Foam Applicator 20ml White Ref 801296 [Pack 10] Page: 272A Pack Size: 10 Reference	Quantity: 1 Returned: 0 Recent: <input type="text"/>	Pack: £ 9.90 Savings: 35% Line: £ 9.90
Sub Total		£ 13.59	
Delivery		£ 0.00	
##Tax Label##		£ 2.38	
Total		£ 15.97	

RETURN ALL RETURN SELECTED

Once the order has been located the order lines will appear with the information as above. In the 'Quantity' column there will be a 'Returned' line (showing you how many of the item have already been returned). To return an item, place a tick in the box in front of the product code and enter the quantity to be returned in the 'Recent' box. Click the 'Return Selected' button to apply the return. If you want to return all items in an order, select the 'Return All' button.

Viewing Reports after Returns

Returns feature as a column at the end of all spend reports. All spend reports show values **after** returns have been taken off.

Copy Account

Here you can copy the details from one account to another. Simply enter the name of the new account to use as a copy of this one. Then click 'Copy Account'.

Home | Updates | Help | Technical Support

COPY ACCOUNT

Account Number DB1970

Enter the name of the new account to use as a copy of this one.

DETAILS
Copy DB1970 Account to:

* means mandatory

Copy Account

This will then bring up the new account with all the details copied over. You then have the option to go in and edit the account.

Contract Pricing

Contract pricing remains consumer specific. The price profiles and the price catalogues are to be made available for any consumer account. However, contract prices reflect a specific price range on a set of products and thus remain unique to each consumer account.

This screen allows you to enter a specific price against a product code. There are two ways in which a product code can be found. Simply enter the code or use the catalogue page headers to search through the catalogue. Once the relevant item has been found, the following information is displayed.

Contract Pricing Screen

CONTRACT PRICES

Account Number Empty

If you know the code of the product you want to find, enter it into the box below.

025000 Find Code Remove Contract Prices

[Browse Product Sections](#)

Enter the contract per and contract price into the fields below to create or edit a contract price.

Product Code: 025000

Pack: 8

Net Price: 18.31

Per: 8

Description: Sellotape Case Sealing Tape Vinyl 38mm x 66m Buff Ref 503845 [Pack 8]

Contract Per: 8

Contract Price: 15.25

Add

Selecting the 'Add' button marks that price against that product code. Should you need to do this for a number of products, use the UPLOAD facility.

A Problem with Contract Pricing

If you find that your contract priced products are not showing the correct price to your consumer, the following example may help to explain why.

The product 025000 is priced at £15.25 – if a user from the account Demo purchase a single quantity of 025000 it will cost him/her £15.25.

You can see the pack size of the product is displayed and can be edited. We suggest that you always use the default pack size – this is the only pack size the consumer can buy the products in.

- If you changed (in this case) 8 to 4 the product would display a price to your consumer of $2 \times 15.25 = 30.50$. This is because this product is sold in pack of 8.
- If you changed (in this case) 8 to 16 the product would display a price to your consumer of $1/2 \times 15.25 = 7.63$. This is because this product is sold in pack of 8.

Removing Contract Pricing

To remove all contract pricing from an account, click the 'Remove Contract Pricing' button.

Customer Volume Break

It is possible to set up quantity breaks for an individual account. This gives the possibility to break using absolute price or discount.

QUANTITY BREAKS

Account Number [Empty](#)

If you know the code of the product you want to find, enter it into the box below.

Find product by code

[Browse Sections](#)

Create or edit volume discount breaks for this customer by entering the break levels and values into the fields below. Any existing volume discount breaks are displayed above.

Volume Breaks for 025000

Break Level	Discount	Delete
<input type="text" value="16"/>	<input type="text" value="10.00"/>	<input type="checkbox"/>
<input type="text" value="24"/>	<input type="text" value="8.00"/>	<input type="checkbox"/>
<input type="text" value="32"/>	<input type="text" value="6.00"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

☐ Percentage volume break
☒ Absolute volume break

(2) Microsoft Office Word

Uploading Customer quantity breaks

If you have a large quantity of products to add, you can use the upload facility (see Data Upload).

The customer account number needs to be in the first column, e.g. **Account number, product code, break type, (price or discount), qty1, price break 1, qty2, price break 2 [up to 5 quantities]**

The example below illustrates:

ACC01,181818,price,10,5,20,3

Customer Code Conversion

In the same way codes can be mapped for all accounts, codes can be mapped for specific accounts. This is done in exactly the same way as Code Conversion.

CUSTOMER CODE CONVERSION

Account Number [Empty](#)

If you know the code of the product you want to find, enter it into the box below.

Add a code to convert to this product in the "Additional Code" field. [Browse Product List](#)

Conversion Code For **MYCODE**

Product Code *

* means mandatory

Exporting Code Conversions

To export all your code conversions go to the 'Exports' section.

Permission Groups

Overview

Permission groups are used to give access rights to users on your site. You can allow different users to have different permissions, for instance to authorise orders, or view only the orders that they have placed themselves.

IMPORTANT - Permission Groups apply to the whole site - if you create (or modify, or delete) a Permission Group, the change will affect ALL accounts on your site.

Before the Permission Groups are modified, there will be three existing groups, called NoAuth, CostCentreAuth and FullAuth. The screen will look like this, with the existing groups displayed:

[Home](#) | [Updates](#) | [Help](#) | [Technical Support](#)

PERMISSION GROUPS

Select a Permission Group to edit from the list below, or click on "Add" to create a new one.

NoAuth
CostCentreAuth
FullAuth

[Move ungrouped users to appropriate groups](#)

Creating Permission Groups

To create a new Permission Group, first click on the "Add" button.

Enter the description of the permission in the 'Description' field. You can then select the relevant permissions to apply to this account from those available.

Authorisation

- Cannot Authorise
- Authorise Own Orders Only
- Authorise Cost Centres Orders Only - the user will be able to authorise orders placed on any cost centre they have access to.
- Authorise All Orders

View Order Reports

- Cannot View Orders
- View Own Orders Only
- View Cost Centre Orders Only - the user will be able to view orders placed on any cost centre they have access to.
- View All Orders

View Quote Reports

- Cannot View Quotes
- View Own Quotes Only
- View Cost Centre Quotes Only - the user will be able to view quotes placed on any cost centre they have access to.
- View All Quotes

Ordering

- Submit an Order - the user will be able to place an order (or submit it for authorisation).
- Create Quote Only - see 'Super Authoriser' for more information.
- Process Quotes - see 'Super Authoriser' for more information.

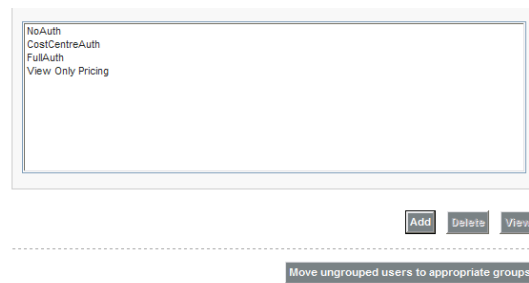
Once all the correct options have been selected, click on the "Save Group Details" button.

The screenshot shows a web form for creating a permission group. At the top, there is a 'Description' field with a red asterisk indicating it is mandatory, containing the text 'View Only Pricing'. Below this, the form is divided into several sections, each with a title and a list of radio button options:

- AUTHORISATION**:
 - ☒ Cannot Authorise
 - ☐ Authorise own orders only
 - ☐ Authorise Cost Centre orders only
 - ☐ Authorise All orders
- VIEW QUOTE REPORTS**:
 - ☒ Cannot View quotes
 - ☐ View own quotes only
 - ☐ View Cost Centre quotes only
 - ☐ View All quotes
- VIEW PRICES**:
 - View Prices ☒
- RETURN CREATION PERMISSIONS**:
 - Return Creation ☐
- VIEW ORDER REPORTS**:
 - ☒ Cannot View orders
 - ☐ View own orders only
 - ☐ View Cost Centre orders only
 - ☐ View all orders
- ORDERING**:
 - Submit an order ☐
 - Create Quote only ☐
 - Process Quotes ☐
- ADDRESSES**:
 - Create Address ☐
- ACCOUNT MAINTENANCE**:
 - Front End Account Maintenance ☐

At the bottom left, there is a red asterisk followed by the text '* means mandatory'. At the bottom right, there is a button labeled 'Save Group Details'.

The group you have just created will be visible now.



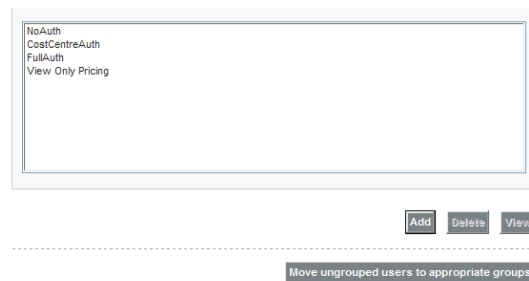
NoAuth
CostCentreAuth
FullAuth
View Only Pricing

Add Delete View

Move ungrouped users to appropriate groups

Modifying Permission Groups

To modify a 'Permission Group', click on the name of the Permission Group in the menu then click 'View' the details of the group will be displayed, and can be modified. When finished click on "Save Group Details".



NoAuth
CostCentreAuth
FullAuth
View Only Pricing

Add Delete View

Move ungrouped users to appropriate groups

Deleting Permission Groups

To delete a group, simply select the group and click '

Warning - if there are users in the permission group that were deleted, they will be moved to "Ungrouped". Their permissions will not change, but you will not be able to see what permissions they do have.

Sorting Ungrouped Users

The button labelled "Move ungrouped users to appropriate groups" will make OSCARnet scan through all existing users that have not yet been applied to a permission group, and will see if they have permission that match those applied to a group. If this is the case, the user will be moved from "Ungrouped" to the matching group. If there are no matching groups, the user will remain in "Ungrouped". A summary of how many users were moved will be displayed.

Assigning Users to Groups

Go to the 'Users' section in 'Customers' (after selecting an account). You will see that the users and groups are displayed. Select the user and click 'Use Contact'.

CONTACTS

Account Number **admin**

Choose a user to edit from the list below, or click on "Add Contact" to create a new one.

Permission Group **All Groups**

[All](#) | [B](#) | [M](#) | [S](#)

Ben Manning Ben Manning
simon manning
kary manning
jason spaceman

FIRST PREV Page 1 of 1 NEXT LAST

[Add Contact](#) [Delete Contact](#) [Use Contact](#)

Go to the 'Web Access' Tab and in the 'Permission Group' drop down menu select the relevant permission. Click 'Save Contact Details'

[Show Contact List](#)

Summary **Web Access** **Orders & Budget Control**

WEB ACCESS

User Name *

Password *

Permission Group **FullAuth**

User Active ☒

DEALER ADMINISTRATOR RIGHTS

Dealer Administration ☒

Enable	Access Right
<input checked="" type="checkbox"/>	Company Information
<input checked="" type="checkbox"/>	Look and Feel
<input checked="" type="checkbox"/>	Edit Text
<input checked="" type="checkbox"/>	Customer Maintenance
<input checked="" type="checkbox"/>	Drina Maintenance

It is important to realise that two users in "Ungrouped" will not necessarily have the same permissions as each other - this is what the "Ungrouped" section is for. It is bad practice to keep users in this group, we would advise you always apply users to a group - create a new group if necessary.

Super Authoriser

This development has been designed to create a 3-tiered authorisation structure. Therefore user1 can place an order, user2 can pre-authorise it, and user3 completes it.

A new level has been created below the normal level. Users in this level will only be able to create a quote. Users in the normal level can process these quotes, and send them for

authorisation in the normal manner. They can also create their own orders if they wish. The top level of authorisation can then complete the orders so they get sent as normal.

New permission options have been created on the 'Permission Groups' section, under 'Ordering'

Description: * RESTRICTED

AUTHORISATION

- ☒ Cannot Authorise
- ☐ Authorise own orders only
- ☐ Authorise Cost Centre orders only
- ☐ Authorise All orders

VIEW ORDER REPORTS

- ☐ Cannot View orders
- ☒ View own orders only
- ☐ View Cost Centre orders only
- ☐ View all orders

VIEW QUOTE REPORTS

- ☐ Cannot View quotes
- ☒ View own quotes only
- ☐ View Cost Centre quotes only
- ☐ View All quotes

ORDERING

- Submit an order ☒
- Create Quote only ☒
- Process Quotes ☐

ADDRESSES

- Create Address ☐

ACCOUNT MAINTENANCE

- Front End Account Maintenance ☐

VIEW PRICES

- View Prices ☒

RETURN CREATION PERMISSIONS

- Return Creation ☐

* means mandatory

Save Group Details

To use the three levels of authorisation, you will need to create a new permission group. In this example it has been called "Restricted", but you can give it a name of your choice. If you set this up with the options above, the group will be on the bottom level. The important part is the fact that "Create Quote Only" is ticked but "Process Quotes" is not. Save this group.

Now, make sure that the NoAuth, CostCentreAuth and FullAuth groups, along with any others you wish not to be on the bottom tier of authorisation have both "Create Quote Only" and "Process Quotes" ticked.

To set up the account correctly, select the account in 'Customers'. Make sure that the normal authorisation settings are how you would like them to be, and that 'Use super authoriser permissions' in the 'Authorisation' section is selected (and saved).

Next, on the 'Users' section, place into the group called "Restricted" (or whatever you have named it) the users you wish to be on the lowest level. Users on higher levels will be able to process quotes placed by lower level users, but only on the cost centres they can view.

Quotes, once processed, become orders awaiting authorisation. The way in which authorisation works from here is the same as before.

A user in this lowest tier of permission will shop as normal – when they add a product to the basket they have a button replacing "checkout now", labelled "Save". As with a normal order, the user can continue shopping, or click on "Save". If they do click on "Save", a confirmation message will be displayed, and then a message to say that the quote has been saved, and that the user can continue to create a new quote if they wish.

Customer Groups

Oscarnet will give you the ability to apply generic settings to several accounts, in the same way that generic settings can be set for account users using permission groups.

You can now create Customer Groups in the 'Customer' section and apply a number of accounts to this group so that they all have the same settings.

From this screen you are able to view customer groups.

Manual Assign Customers To Groups

Big Spenders (1)
comedine (1)
Medium Spenders (1)

Create Group Delete Edit

Synchronise Ungrouped Accounts with Appropriate Groups

You can create new groups by selecting the 'Create Group' button.

It is also possible to apply a new account to a group. When creating the account, select the appropriate group from the account group drop down menu.

CUSTOMER DETAIL

Select Customer

Summary Prices & Display Options Settings

Account Number (Reference) DE1970

Account Name The Good Shepherd

Account Group comedine

INDUSTRY INFORMATION

Revenue Band Big Spenders

Employee Band

It is also possible, if enabled, to enter your First Timer User (FTUser) account into a group, if you want all first time users to have the same settings as some of your account customers.

Again it is possible to set a particular group as the default group for new accounts by selecting the group name from your default settings area.

Default Price Catalogue

Allow First Time Users ☒

Default Product Suggestions ☒

AG Account Mask

Default PO Number Mask

Default Wholesaler Quantity Breaks ☐

Default Dealer Quantity Breaks ☐

Create Address ☐

Default Customer Group

Max Number of Products to Compare *

Max Number of Related Products

Enable Customer Product Sorting ☒

Enable Front End Account Maintenance ☐

MAILERS

Included	Direct Mail Catalogue Name
<input type="checkbox"/>	Nemo

* means mandatory

save

You also have the option to automatically sort your accounts into groups according to the settings that are set in the group and in the accounts. For this option to work the group settings must exactly match the settings in the accounts.

If you wish to use this option, select the button at the bottom of the customer group's tab, labelled "Synchronise Ungrouped Accounts with Appropriate Groups". Having selected this option OSCARnet may schedule this task to take place overnight to avoid problems with your live system.

Manual Assign Customers To Groups

Big Spenders (1)
comedine (1)
Medium Spenders (1)

Create Group Delete Edit

Synchronise Ungrouped Accounts with Appropriate Groups

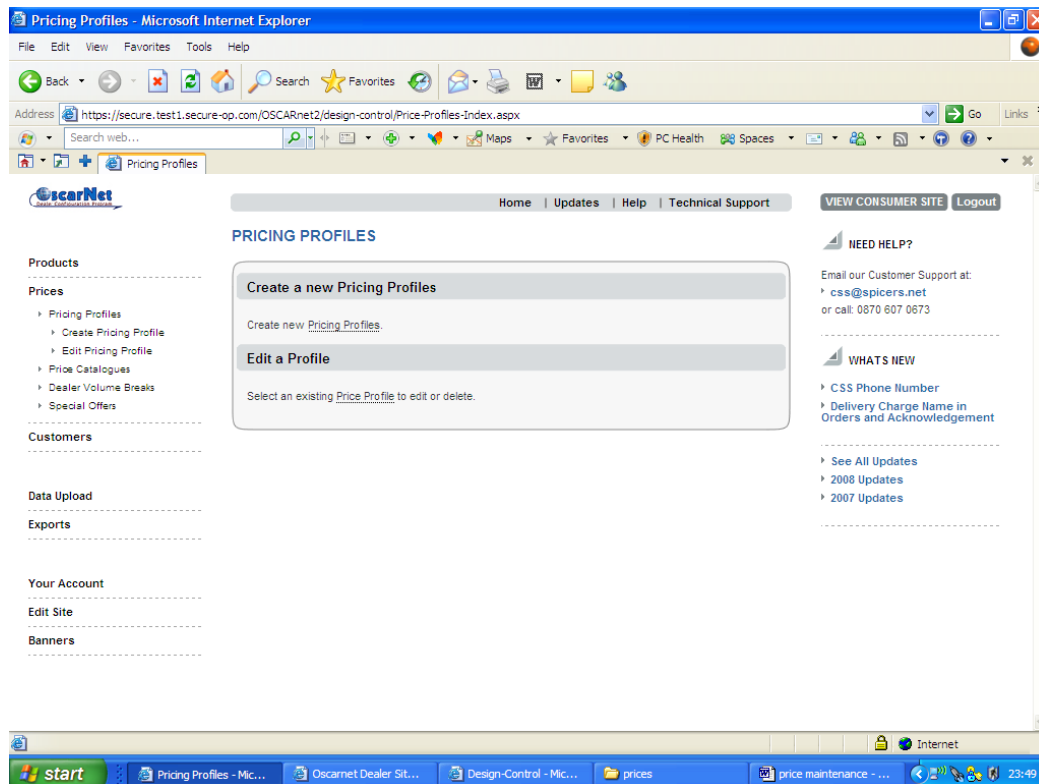
Pricing

Pricing Profiles

The Link "Pricing Profiles" includes a number of pricing mechanisms that collectively build a 'Price Profile'. This can later be applied to a number of accounts.

The following screen shows the new link

Price Profiles



Maintaining price Profiles

Entering into the 'Price Maintenance' link immediately prompts two choices. These are: -

- Create Pricing Profile
- Edit Pricing Profile

Creating a New Price Profile

Selection of this option allows you to build a new price profile. At this stage, all products will be priced at list price (RRP). The pricing options available are: -

- Range / Group (including the ability to apply an overall discount)

- Pricing Band Letter (Band)
- Discount Exceptions
- 5 Star / Mini Catalogue

Inside Pricing

The screenshot shows the 'Price Profile Details' page for 'furlong' in the 'Bands' tab. The page is displayed in Microsoft Internet Explorer. The left sidebar contains navigation links for Products, Prices, Customers, Data Upload, Exports, Your Account, Edit Site, and Banners. The main content area has tabs for 'Ranges And Groups', 'Bands', 'Discount Exceptions', and 'Five Star And Mini Catalogues'. The 'Bands' tab is active, showing a table with columns: Pricing Band Letter, Spicers products, Own products, and Description. The table lists Price Bands A through H with their respective discount percentages and descriptions.

Pricing Band Letter	Spicers products	Own products	Description
Price Band A	50.00 %		5 Star 'A' Lines
Price Band B	50.00 %		5 Star 'B' Lines
Price Band C	30.00 %		Mini Catalogue 'Core Branded Lines
Price Band D	10.00 %		Discount Exceptions
Price Band E	20.00 %		EOS Computer Consumables
Price Band F	30.00 %		Furniture & Large Products
Price Band G	30.00 %		Main catalogue Balance A-Lines
Price Band H			Main catalogue Balance B-Lines

Applying an Overall Discount

The first Pricing Tab (Range / Group) contains a field in which an 'Overall Discount' can be applied. A percentage figure should be entered here; this percentage will then be subtracted from the retail price on ALL products.

The screenshot shows the 'Price Profile Details' page for 'furlong' in the 'Bands' tab. The 'Overall Discount' field is visible, with the value '20' entered. The 'Apply Overall Discount' button is highlighted. Below the discount field is a table listing various product ranges and their associated discount percentages.

Range	Description	Discount
1	J D Envelopes	20.00 %
2	J D Envelopes	20.00 %
3	J D Envelopes	20.00 %
4	5 Star Envelopes	20.00 %
5	J D Books and Pads	20.00 %
6	Reserved	20.00 %
7	P Coded EOS Duplicates	20.00 %
8	EOS Consumables	20.00 %
9	Furniture	20.00 %
10	Sundries 1	20.00 %
11	Sundries 2	20.00 %
12	Sundries 3	20.00 %

If a value of 20.00 is entered then 20% of a products retail price will be subtracted and a new sell price determined.

For example, product code 00215X , which has a Retail Price of £12.68. To sell all products to Consumer A with a 20% discount.

The pricing rule will work as follows: -

$$20\% = (0.2) * £12.68 = £2.54$$

£12.68 - £2.54 = £10.14. So product 00215X will have a price of £10.14

Note: This method of pricing is not specific to only 00215X. All products will be reduced by 20%.

If this is the only modification you wish to make, select the Save Profile button.

Applying Range / Group Discounts

Spicers' products are categorised into various Ranges and Groups. To price using this method, the Spicers Ranges will be displayed as follows.

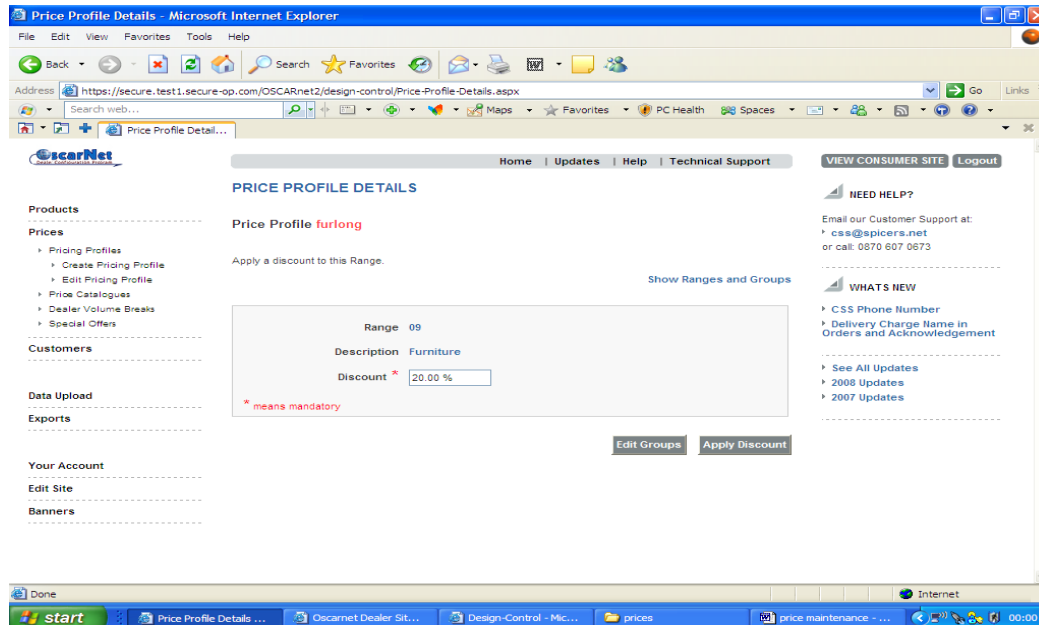
The screenshot shows the 'Price Profile Details' page in a Microsoft Internet Explorer browser. The page title is 'Price Profile Details - Microsoft Internet Explorer'. The address bar shows the URL: <https://secure.test1.secure-op.com/OSCARnet2/design-control/Price-Profile-Details.aspx>. The page content includes a navigation menu on the left with sections like Products, Prices, Customers, Data Upload, Exports, Your Account, Edit Site, and Banners. The main content area is titled 'PRICE PROFILE DETAILS' and shows the 'Price Profile furlong'. Under the 'Ranges And Groups' tab, there is a table with columns 'Range', 'Description', and 'Discount'. The table lists 12 ranges, all with a 20.00 % discount. A sidebar on the right contains links for 'NEED HELP?', 'WHAT'S NEW', and 'See All Updates'. The bottom of the page shows the Windows taskbar with several open applications.

Range	Description	Discount
1	J D Envelopes	20.00 %
2	J D Envelopes	20.00 %
3	J D Envelopes	20.00 %
4	S Star Envelopes	20.00 %
5	J D Books and Pads	20.00 %
6	Reserved	20.00 %
7	P Coded EOS Duplicates	20.00 %
8	EOS Consumables	20.00 %
9	Furniture	20.00 %
10	Sundries 1	20.00 %
11	Sundries 2	20.00 %
12	Sundries 3	20.00 %

Note: If an overall discount of 20% had been applied, the display would be as above:

Applying individual Range discounts

To add a different discount to a particular Range, you must first select the Range to be edited. A single click on the selected Range will prompt for the input of the discount. This will appear in the central pane.



The assigned discount will apply to **this Range only**. To apply the inputted discount you must select the 'Apply Discount' button. To confirm that this has saved, a percentage character will appear.

NOTE: When setting a Range discount, the default setting is to apply the same discount to all Groups within that Range.

Applying Individual Group Discounts

Each Range contains several Groups. To edit a particular group, select the "Edit Group" button. Selection of the 'Edit Group' button provides the options to;

- View any discounts already set up for Groups in this Range
- Edit a Group Discount by entering the Group number followed by the discount percentage.
- Give an additional option to apply that Group discount for all Ranges that the Group belongs to

For example, Group 80 appears in Ranges 1,2,5,10 and 14. It is then possible to select Range 1, select Group 80, set a 30% discount and before applying these changes, select the check box named 'All Ranges'

The 30% discount would then be applied to all Group 80 products in Ranges 1,2,5,10 and 14. If selection of this box is not made, then Group 80 in Range 1 only, will have the 30% discount applied.

NOTE : To apply the inputted discount you must select the 'Apply Discount' button. To confirm that this has saved, a percentage character will appear.

Applying Pricing Band Letter Discounts

Pricing Band Letters are displayed with a corresponding field in which a discount can be entered. If an 'Overall Discount' has been applied, the default will be to display the Overall discount in the Pricing Band Letter Fields.

NOTE : To apply the inputted discount you must select the 'Save' button. To confirm that this has saved, a percentage character will appear.

Dealer Own Bands

OSCARnet now gives you the ability to apply different discounts to Spicers products and non-Spicers products using pricing bands.

You can now apply different discounts to different banded products that are in the Spicers catalogue to ones that are not.

In the Design-Control section select the relevant price profile for an account from the band tab under customer maintenance. In this screen you can enter different discounts for your Spicers products and your non-Spicers products for different pricing bands.

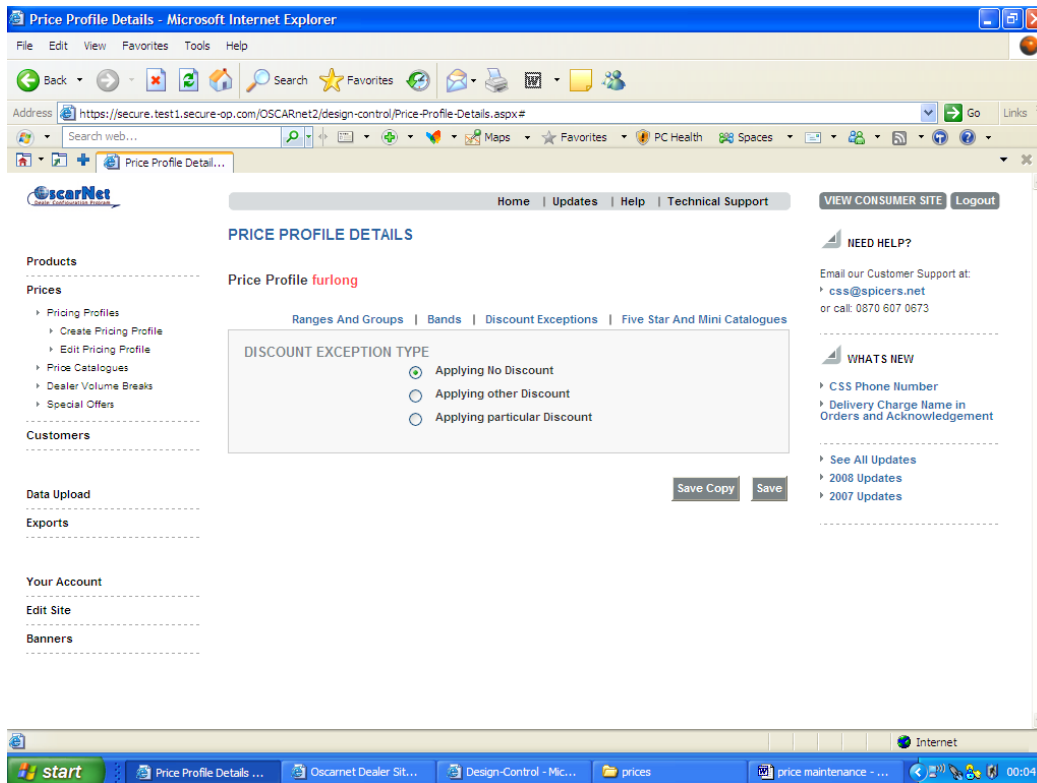
When you have entered your discount you must make sure you save the profile three times. Firstly, the save button at the bottom, then the save profile button on the top right, and finally save the profile on the last screen that appears.

If you then apply this price profile to an account as normal the prices will be discounted depending on whose products they are and which band they are.

Applying Discount Exception Discounts

This screen displays 3 options

- Applying No Discount
- Applying Other Discount
- Applying Particular Discount



The required option can be selected by the use of radio buttons. It is not possible to select more than one of these options - selecting one deselects the other.

Applying No Discount

This is the default setting. Any Range, Group, Pricing Band Letter discount, or contract price will **not** be applied to discount exception products if this option is selected.

Applying 'other' Discounts

If this option is selected, discount exception products are treated as standard products and **will** be discounted.

Applying A Particular Discount

Selection of this option will prompt for the entry of a discount into a given field. All "Discount Exception" products will receive the entered discount, regardless of any Range, Group or Pricing Band Letter discounts that have been set up.

Note: The exception to this rule is for contract pricing. Any net priced product will take precedence over this setting.

For example, product code 636840 is a discount exception. If a value of 2.00% is entered then all discount exception products will receive a two percent discount – **unless they have been priced using contract pricing or price catalogues.**

NOTE: To apply the inputted discount you must select the 'Save' button. To confirm that this has saved, a percentage character will appear.

Applying Mini Catalogue / 5 Star Discounts

This screen presents two options. These are

- Mini Catalogue Discount
- Five Star Discount

The two options both provide a field for the entry of a discount. It is possible to enter discounts in both fields. Spicers' product range includes some product codes that are flagged as being in 'Spicers Mini-Catalogue'. (This is not to be confused with the mini catalogues that you can set up in OSCARnet). Some product codes are also classed as 5 Star and some both. Discounts set against 5 Star and/or Mini-Catalogue products are compared with discounts set up for Ranges, Groups and Pricing Band Letters. The best price between these set of discounts is then applied.

Exceptions to this are when products are discounted by contract price or if they happen to be Discount Exception products.

NOTE : To apply the inputted discount you must select the 'Save' button. To confirm that this has saved, a percentage character will appear.

Editing Existing Price Profiles

To edit an existing price profile, you should select the list of price profiles that exist. Selection of an existing price profile displays the prices that were assigned to that profile when last saved.

Saving a Price Profile

Once all maintenance has been completed, there are two scenarios in which the profile can be saved.

Saving a New Price Profile

If you originally selected to create a new price profile, the option to save this will prompt for a filename. This is NOT to be stored locally (on your PC) but in the OSCARnet database. File names should be alphanumeric (numbers and letters only - no symbols - #\$_-+>|&*." etc.) and no more than 20 characters in length.

NOTE: The Save Profile button is available at all times regardless of which pricing option the dealer is using. I.e. If you are using Range/Group pricing, then the save button is available. If you are using the Discount Exceptions option, the same save button is still available.

Saving an Existing Price Profile

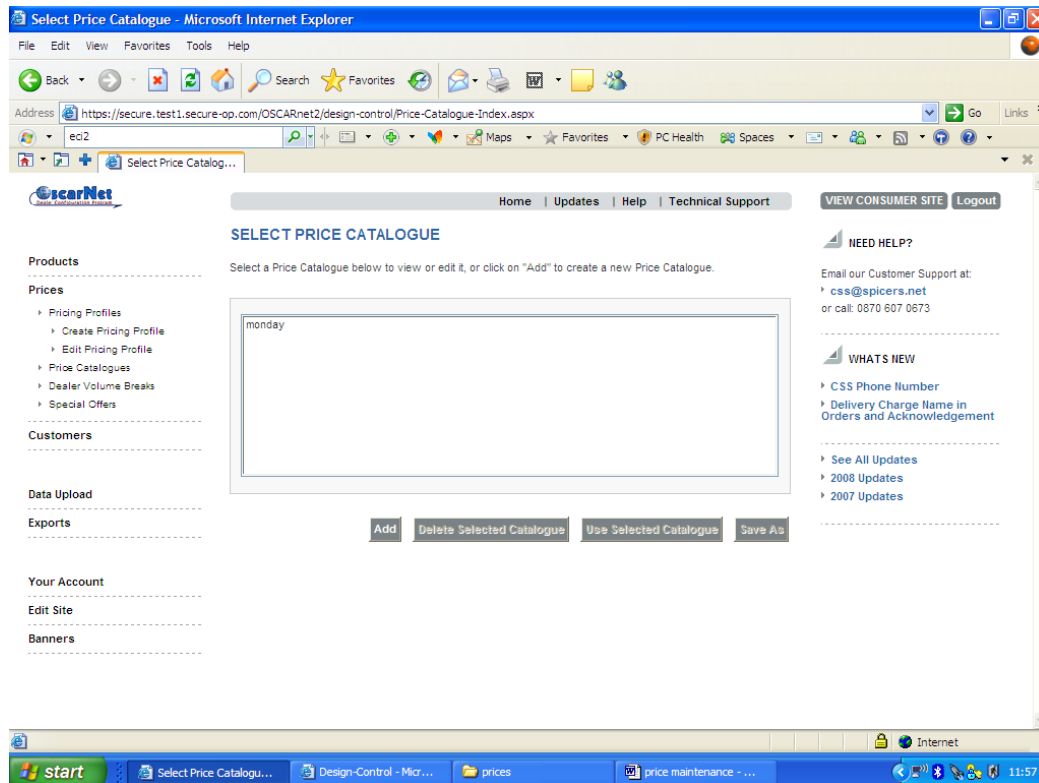
If you have opted to maintain an existing profile, the 'Save' option will provide two possibilities.

- Overwrite the existing profile
- Save as a new profile

NOTE: If you choose to overwrite an existing profile, any consumer account assigned to that profile would be updated immediately.

Price Catalogues

The mechanism of applying a price file remains unaltered although the business logic of 'best price' is being changed.



You Must Read This - Pricing Above List Price

The Contract Price of any product is to take priority over any other discounts/prices that exist for this product.

It is therefore possible to set a product price *Higher* than the retail price.

The only exception to this rule is determined in the settings for Discount Exception products.

Applying Prices to Consumer Accounts

This document has so far described ways in which prices can be maintained. This section describes how the prices are applied to Consumer accounts.

Applying Price Profiles

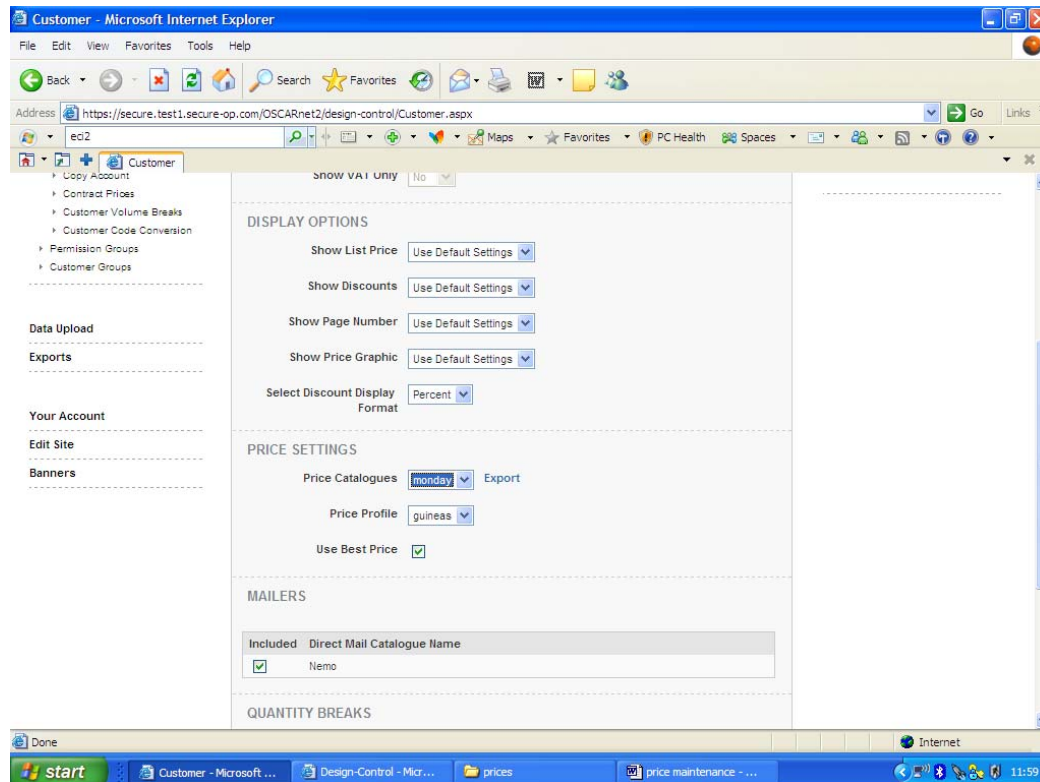
In the account details screen of Design-Control, the Price Settings sections provides the facility to apply any existing Price Profiles to the account selected.

A Price Profile is selected from a drop down list as shown below.

Applying Price Catalogues

Repeat as above but this time if you wish to apply a price catalogue to the relevant account.

Price Profiles and Catalogues



Pricing Precedence

OSCARnet pricing now allows products to be discounted in many different ways. In order to determine which price is actually displayed, the following rules of precedence are in place.

1. Discount Exceptions take top priority if the 'Do Not Apply Discounts' option has been selected
2. Contract Pricing takes precedence over both Price Profiles and Price Catalogues
3. Price Catalogues take precedence over Price Profiles

And within Price Profiles ...

4. Pricing Band Letter discounts take precedence over Range / Group discounts
5. Group discounts take precedence over 'Range Only' discounts.
6. Mini Catalogue and / or 5 Star discounts are compared with discounts that have been determined by methods 4 and 5. The lowest price then prevails.
7. All of the above take precedence over an Overall discount

An example

Product Code 333301 has a Pricing Band Letter of 'A', Range 1, Group 80 and is a 5 Star code with retail price of £10.00. Discounts are set as follows.

Discount Exceptions – n/a this is not a discount exception product

Contract price – n/a the product has not been contract priced

Pricing Band Letter 'A' discount is 10%

Range 1 discount = 20%

Group 80 discount = 10% (for all ranges)

5 Star Discount = 5%

Pricing Band Letter 'A' discount overrides the Range/Group discount and so the 5 Star discount of 5% is compared with the Pricing Band Letter 'A' discount of 10%. Of course, Pricing Band Letter 'A' offers better discount and therefore the discount for product code 333301 is 10%.

Quantity Breaks

This screen gives you the option of applying quantity breaks to product codes. Breaks are an incentive to attract larger orders by offering larger discount against larger quantities. They are generic and NOT customer specific. Once set up, quantity breaks are displayed when viewing a product

The set up screen is as follows and as you can see allows for the input of more than one quantity / discount. You can browse the page headers or type in a product code into the box on the right. You can delete individual breaks and edit the % discounts for each break level.

Please note - "10" in a Discount (%) field denotes 10% off Retail. If you have Contract Priced a particular product for an account and this price is better than the discount break – discount break values are ignored – best price wins.

Figure 3 Applying Quantity Breaks

DEALER VOLUME BREAKS

If you know the code of the product you want to find, enter it into the box below.

Product Code

[Browse Product List](#)


Enter a quantity into the "Break Level" field, and a discount or price into the "Discount" field to apply better prices to higher quantities. Choose Absolute to apply a price, or Percentage to apply a percentage discount.

Volume Breaks for 181818

Break Level	Discount	Delete
<input type="text" value="3"/>	<input type="text" value="20.00"/>	<input type="checkbox"/>
<input type="text" value="5"/>	<input type="text" value="15.00"/>	<input type="checkbox"/>
<input type="text" value="10"/>	<input type="text" value="10.00"/>	<input type="checkbox"/>
<input type="text" value="12"/>	<input type="text" value="8.00"/>	<input type="checkbox"/>
<input type="text" value="15"/>	<input type="text" value="5.00"/>	<input type="checkbox"/>

☐ Percentage volume break
☒ Absolute volume break

Once the breaks have been set up, this is how they appear on the front end:



- Three-ring PVC binders
- Matching coloured A-Z indexes and unlabelled continuation sheets
- Coloured Mylar reinforced tabs and punched holes for durability
- Size: A5 210x148mm
- Black

Pack Weight 0.515 kg
Pack Dimensions 205x231x39 mm

[add to custom catalogue +](#)

Compare	Product Code	Pack Size	P.V.P. per Pack	Price	Price Incl VAT	Saving	No. of Packs	Add to Basket
<input type="checkbox"/>	181818	1	£ 21.80	£ 12.98	£ 15.25	30%	<input type="text" value="1"/>	<input type="button" value="+"/>

Save more by buying 3 Packs £ 20.00 per pack.
 Save more by buying 5 Packs £ 15.00 per pack.
 Save more by buying 10 Packs £ 10.00 per pack.
 Save more by buying 12 Packs £ 8.00 per pack.
 Save more by buying 15 Packs £ 5.00 per pack.

Special Offers

To create a special offer, enter the product code in the box and select 'View Special Offer' this will bring up the following information.

Figure 5 Creating a Special Offer

The screenshot displays a web application interface for managing special offers. On the left is a navigation menu with categories: Products, Prices, Customers, Data Upload, Exports, Your Account, Edit Site, and Banners. The 'Prices' section is expanded, showing sub-options: Create Pricing Profile, Edit Pricing Profile, Price Catalogues, Dealer Volume Breaks, and Special Offers. The main content area is titled 'SPECIAL OFFERS' and includes instructions: 'If you know the code of the product you want to find, enter it into the box below.' Below this is a text input field containing '29748x' and a 'View Special Offer' button. A secondary instruction states: 'Below is a list of existing Special Offers. Click on the offer to edit or amend it.' with links for 'Show Existing Special Offers', 'Browse Sections', and 'Add New Offer'. The 'Special Offer details for 29748X' are shown in a form with the following fields: 'Special Offer Code' (with a red asterisk and the value 'Lever Arch File'), 'Retail Price' (€ 69.90), 'Price(K)' (20.00), 'Start Date' (05 June 2008), and 'End Date' (05 June 2009). A 'Special offers override' section contains three checked checkboxes: 'Contract Price', 'Price Catalogue', and 'Discount Exceptions'. A red note at the bottom left of the form states '* means mandatory'. A 'Modify Special Offer' button is located at the bottom right of the form.

When setting up a special offer, the following details need to be input;

Special Offer Code

This is not to be confused with the product code. This is merely a title for your promotions. It is NOT displayed to the consumer.

Price

The price at which this code will be sold, for the duration of the offer.

Start / End Date

Set the period of time from which you wish the offer to run. Future dates can also be set.

After completing these details, select the 'Modify Special Offer' button. Doing so saves the details. You can set a code up to be a special offer as many times as you like – e.g. Aug to Sept 2001 at £12.00, Jan to April 2002 at £12.56 etc, etc.

Special Offers and Pricing Precedence

When applying a special offer, it is possible to set whether the price overrides

- A contract price set on it
- A price catalogue price
- Any discount exception rules

You can browse through the Product Index by selecting 'Browse Sections' or select 'Show Existing Special Offers' to view active or expired special offers.

SPECIAL OFFERS

If you know the code of the product you want to find, enter it into the box below.

Enter Product Code

[View Special Offer](#)

Below is a list of existing Special Offers. Click on the offer to edit or amend it. [Browse Sections](#)

Status	Special Offer Code	Description
●	51443X	Uni-ball SX210 Jetstream Rollerball Pen 1.0mm Tip Black Ref 9008000 (Pack 12x2 and Bear) Oct-Dec 2006
●	525488	5 Star Office 2009 Year Planner Laminated Mounted W915xH610mm
●	297013	5 Star Office Punched Pocket Polypropylene Top-opening 50 Micron A4 Clear (Pack 100)
●	k	TEST - Bisley BS4E Filing Cabinet Flush-front 4-Drawer W470xD622xH1321mm Goose Grey Ref BS4E-73
●	557100	Rexel V20 Shredder Straight Cut 5.8mm 3m/min 4kg 370x320x220mm Ref 2100886
●	00215x	Tipp-Ex Rapid Correction Fluid Fast-drying with Foam Applicator 20ml White Ref 801296 (Pack 10)
●	366676	Hewlett Packard [HP] No. 45A Inkjet Cartridge 42ml Black Ref 51645AE-ABB

Next to the product code, the key for status is displayed as follows.

RED - Special Offer has expired

GREEN - Special Offer is currently running







You can click on the offer to edit or amend it.

Special Offers - Front End

When the customer views the Special Offer screen the products on Special Offer are displayed with the thumbnail image, the main description, the Special Offer price, and the saving.

The order quantity box allows the customer to specify the number of products they want to order and add them to their basket by clicking the "Add to Basket" button. Only one product is added to the shopping basket if customer clicks the "Add to Basket" button. Please note: all other products will not be added to basket even if they have a quantity entered.

If the customer clicks either the description or the image, they are forwarded to the product details. A sample Special Offers page is shown below.

<p>Concord CD6 Telephone Index Book Binder with Matching A-Z Index and 20 Sheets A5 Black Ref 83010 Product Code: 181818 Pack Size: 1</p> <p>PROMOTION</p>  <p>Price: £ 2.00 Price Incl VAT: £ 2.35 Saving: 89.2%</p> <p>1  add to basket</p>	<p>5 Star Office Lever Arch File 70mm Foolscap Cloudy Grey [Pack 10] Product Code: 29748X Pack Size: 10</p> <p>PROMOTION</p>  <p>Price: £ 25.00 Price Incl VAT: £ 29.38 Saving: 50.9%</p> <p>1  add to basket</p>	<p>Bisley BS4E Filing Cabinet Flush- front 4-Drawer W470xD622xH1321mm Goose Grey Ref BS4E-73 Product Code: 070307 Pack Size: 1</p> <p>PROMOTION</p>  <p>Price: £ 100.00 Price Incl VAT: £ 117.50 Saving: 64.3%</p> <p>1  add to basket</p>
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Internet 100%

Introduction

This tab contains information about your company. Most of this will already be populated when your site is first created. However there are certain fields that you may wish to utilise at a later date.

Your Account

Company Details

The screen is split into three areas of information and appears as follows. *Figure 1 Your Details*

Company Details - Microsoft Internet Explorer

Address: <https://secure.test1.secure-op.com/OSCARnet2/design-control/Company-Details.aspx>

COMPANY DETAILS

General Customer Services & Sales Technical Support

YOUR COMPANY DETAILS

Company Name:

Company Address 1:

Company Address 2:

Company Address 3:

Company Address 4:

Company Address 5:

Post Code:

Phone:

Fax:

Fax (for credit card details):

Email orders to:

Receive Copy of Acknowledgement: ☒

NEED HELP?

Email our Customer Support at:
• css@spicers.net
or call: 0870 607 0673

WHAT'S NEW

- [CSS Phone Number](#)
- [Delivery Charge Name in Orders and Acknowledgement](#)
- [See All Updates](#)
- [2006 Updates](#)
- [2007 Updates](#)

General Tab

Whilst most of the fields are self-explanatory, **the email field can have a direct impact on how your system operates.**

Should you choose to have your OSCARnet orders transmitted via e-mail, then it is this e-mail address that the orders will be sent to. E-mail is also used as a back-up in the case of a failure to transmit to your Dealer system.

It is therefore very important that this email address be populated.

Contact Details

The next tab is to set the customer service and sales e-mail addresses

- **Customer Services** Email address is used when a consumer queries an order.
- **Sales** Email address is used when a consumer requests a price on a product.

The final tab is technical support

Technical Support details email addresses are used to advise you, the dealer, of any developments or issues with the OSCARnet software.

Default Settings

This section allows you to set up a number of defaults – i.e. settings that affect all new accounts unless you (the dealer) stop them doing so, on an account by account basis. There are a couple of exceptions e.g. – generic settings that affect all or none of your accounts.

The screenshot displays the 'System Settings' interface for OSCARnet. The main content area is titled 'SYSTEM SETTINGS' and features three tabs: 'Default Settings', 'Quotes, Orders & Returns', and 'Prices, Discounts & Payments'. The 'Default Settings' tab is currently selected, showing a list of configuration options. These include 'Order Acknowledgement' (set to 'Html'), 'Default Charge Credit' (checked), 'Default Charge Account' (unchecked), 'Default Price Profile' (set to 'No defaults'), 'Default Delivery Charge' (set to 'No defaults'), 'Default Price Catalogue' (set to 'No defaults'), 'Allow First Time Users' (checked), 'Default Product Suggestions' (checked), 'AG Account Mask' (empty text field), 'Default PO Number Mask' (empty text field), 'Default Wholesaler Quantity Breaks' (unchecked), 'Default Dealer Quantity Breaks' (unchecked), 'Create Address' (unchecked), and 'Default Customer Group' (set to 'No Default Group'). The left sidebar contains navigation links for 'Products', 'Prices', 'Customers', 'Data Upload', 'Exports', 'Your Account' (with sub-links for Company Details, System Settings, Order Transfer, Delivery Charges, Timed Delivery Charges, Order Status, Returns Approval, and Terms & Conditions), 'Edit Site', and 'Banners'. The right sidebar includes a 'NEED HELP?' section with contact information for customer support and a 'WHAT'S NEW' section with links to 'CSS Phone Number', 'Image Upload Restrictions', 'See All Updates', '2008 Updates', and '2007 Updates'.

Order Transfers

This screen displays one of the most important options in OSCARnet. It determines and controls the method and frequency in which you receive your orders. The screen layout is as follows:

Figure 2 Order Transfers

The screenshot shows the 'Order Transfer' page in a Microsoft Internet Explorer browser. The browser's address bar displays the URL: <https://secure.test1.secure-op.com/OSCARnet2/design-control/Company-Orders.aspx>. The page features a navigation bar at the top with links for 'Home', 'Updates', 'Help', and 'Technical Support'. On the left side, there is a sidebar menu with categories like 'Products', 'Prices', 'Customers', 'Data Upload', 'Exports', 'Your Account', 'Edit Site', and 'Banners'. The main content area is titled 'ORDER TRANSFER' and contains a 'Service Controls' section with buttons for 'Start/Continue Service' and 'Pause Service'. Below these are input fields for 'Dealer System' (set to 'Spicerlink Web'), 'Account Number' (6100009), 'Branch Code' (JW), and 'Order type' (D). A 'SAVE CHANGES' button is located at the bottom right of the form. A right sidebar contains 'NEED HELP?' and 'WHAT'S NEW' sections.

Transfer Method: Set this to your Dealer System. (Progress, Spicerlinkweb etc.)

Account: *(this should not be confused with the Consumers Account Number)* Should you choose to have OSCARnet orders transmitted directly into your system, an account number is required. Only ONE account number is needed. This is because OSCARnet can batch orders. It is therefore possible to have ONE order file containing orders for MANY different accounts. The only way to accept these is under this one 'dummy' account number.

Password: As with 'Account,' a password is required to integrate with your Dealer system.

Send Method: This option determines how you receive your orders. This will be either:

- Modem to system - OSCARnet will use dial-up modem to transfer the orders
- Email to system (IEPOP) - orders are emailed directly into your system (Progress only)
- By E-Mail only
- Email to System
- By FTP
- FTP to System

When orders are sent by E-Mail, two attachments are sent. One is a simple text file and the other is the actual order file that can then be imported manually into your system. It is therefore very important that even though you are receiving orders by e-mail, the 'Transfer Method' option is set to the correct system type.

Modem Phone Number: The number of the modem used to dial into your system.

Send Interval: Should you choose to have your orders batched, they will batch every X minutes. (Where X is the number set in this field.) **We suggest a minimum of 15 minutes – this ensures your orders are not sent individually.**

Batch Order: If this is set to 'false', then OSCARnet orders will be transmitted to you every time one is completed. If set to 'true' then the 'Send Interval' is checked and orders are only transmitted periodically. **We suggest that you always have this set to true.**

*(These options are only applicable if ordering directly into your system)

Authorisation Code: this is only applicable for those dealers using IEPOP.

Service Control: This allows you to pause the order processing at anytime. This process is useful if you are having issues with your email server or your back office system. It will hold off sending the OSCARnet orders through.

Delivery Charges

All delivery charges are defined in the 'Delivery Charges' and 'Timed Delivery Charges' area of 'Your Account' using 'Design Control'.

Figure 1 Delivery Charge Screen

Figure 1 above shows the 'Delivery Charge Screen', containing the standard delivery charge file(s). It is via this screen you will set up the delivery charges that will be applied to your customer accounts.

or call: 0870 607 0673

WHAT'S NEW

- CSS Phone Number
- Image Upload Restrictions
- See All Updates
- 2008 Updates
- 2007 Updates

Customers

Data Upload

Exports

Your Account

- Company Details
- System Settings
- Order Transfer
- Delivery Charges
- Timed Delivery Charges
- Order Status
- Returns Approval
- Terms & Conditions

Edit Site

Banners

Name * UK

Band	Price	Timed Delivery
300.00	5.00	None
700.00	3.50	None
9,999,999	0.00	None

ADD DELIVERY CHARGE ITEM

Band

Price

Timed Delivery None

Add Item

* means mandatory

Save Changes

Figure 2 Delivery Charge Details

- Click on *Create New Delivery Charge*. Enter the name of the Delivery Charge.
- Enter your first band.
- Generally the first band will be set as zero – and a price allocated.
- The first value is the upper threshold of the zero band. (e.g. first band £300 charge £5, second band £700 charge £3.50, third band £999999.99 charge £0 – for any order value up to and including £300 a £5 delivery charge is applied, for any order greater than £300 and up to and including £700 a £3.50 delivery charge is applied, any order value greater than £700 up to £999999.99 is free of delivery charge).
- You can set an unlimited number of price bands.
- To save the price bands the click on the 'Save Changes' icon.

Timed Delivery Charges

You can set up timed delivery charges to complement the Order Value Bands (see figure 2). Timed delivery charges, (e.g. pre 10 am, pre 12 am, Next Day Delivery etc.) are created and then allocated to an order value delivery charge band.

They are displayed in the checkout screen when a delivery charge is applied to an order (through the user, accounts, cost centres or default). This only occurs if the Timed Delivery Charges are linked to the active Delivery Charge, i.e. if you do not offer pre 10 deliveries to the North Pole, your customers there will not be able to select this option.

Select the applicable Timed Delivery Charge and links it to an Order Value band. You can choose whether the timed delivery charge will either be added to or replace the order value charge.

You do not have to allocate Timed Delivery Charges to Order Value Bands.

Figure 3 Timed Delivery Screen

For example – Order Value charge for an order less than or equal to £30 is £1.50, and a pre 10 am Timed Delivery charge is allocated of £5.00 – if you have selected that the Order Value Charge and Timed Delivery charge be added together then actual delivery charge will be £6.50. However if the Timed Delivery charge is flagged to replace the Order Value charge the actual delivery charge will be £5.00.

To define Timed Delivery charges

- Enter the name of your delivery charge bands –
- Enter a description for your charge (e.g. Pre 10 am or Next Day Delivery)
- Enter a cost for the delivery charge (e.g. £5)
- Select either 'Add to standard delivery charge' to add your timed delivery charge to the standard delivery charge or 'Replace standard delivery charge' to replace the delivery charge with the timed delivery charge.
- By Clicking on 'Add Item', this allows you to set up more than one timed delivery.
- Otherwise, click on 'Save Changes' to save the timed delivery charge band.
- Repeat the above process to set up more timed delivery charge bands
- You can set an unlimited number of timed delivery charge bands

Applying Timed Delivery Charges to Order Value Charges

Figure 4 Timed Delivery Allocation Screen

- When you have set up timed delivery bands the Standard Delivery Charges will display an extra column with the available timed delivery charges in a drop-down menu (fig 3)
- You can apply different timed delivery bands to the different order value bands or select the same timed delivery bands to each order value band.
- Clicking on the grey arrow icon gives a pop up window. The pop up displays the timed delivery charges under the Time Delivery charge category.

Name *

DELIVERY CHARGE ITEMS		
Band	Price	Timed Delivery
300.00	5.00	Pre 12

Name	Charge	Total
Delivery Before 12	15.00	20.00
Delivery Same Day	20.00	20.00

ADD DELIVERY CHARGE ITEM

Figure 5 Timed Delivery Confirmation Screen

- Against each Timed delivery the total delivery charge is displayed (i.e. the total charge dependent on whether the timed charge has been flagged to either replace or be added to order value charge.)
- Click 'Save Changes' will apply the timed delivery charges to the order value bands.

Internet Registration Default Delivery Charges

See the section on default settings.

Customer Account Default Delivery Charges

See the Customer maintenance section

How Delivery Charges are applied in the Consumer End

Shopping Basket

The delivery charges appear in the users shopping basket – this will be applied according to the Standard Delivery Charge file allocated to the delivery address for the user.

Checkout - Confirm Address

When the user has checked-out they have the ability to change their type of delivery to a Timed Delivery Charge (if Timed Delivery Charges have been set-up in Design-Control for the Delivery Charge File). Selecting the radio button for delivery type performs this action.

The user selects the applicable Timed Delivery charge and continues with payment for the order as previously (i.e. charge my card, charge my account) and the new delivery charge is recognised.

Figure 6 Consumer Delivery Charges

Please select the correct delivery type from the list below			
	Delivery Type	Delivery Charge	Total Cost
<input checked="" type="radio"/>	Pre 10am	£ 11.75	£ 21.80
<input type="radio"/>	Saturday Pre 12pm	£ 17.02	£ 27.87
<input type="radio"/>	Saturday Pre 10am	£ 19.09	£ 30.03
<input type="radio"/>	Pre 12pm	£ 14.10	£ 24.15

Please enter parcel label

Parcel Label:

[Home](#) | [Special Offers](#) | [Contact Us](#) | [Terms And Conditions](#) | [Your Account](#) | [Logout](#)

Allocating Charges

Delivery charges are allocated to addresses, delivery addresses are linked to cost-centres. If the user changes his cost centre in the shopping basket, potentially the standard delivery charge will change.

Changing Address

If the user changes the delivery address in the Checkout - Confirm Address page then it is also possible that the types of delivery charges will change depending on what Delivery Charge file is allocated to that address.

Changing Cost Centre

If the user selects a cost centre or delivery address that does not have a delivery charge file allocated to it, it is possible that the user can have zero delivery charge attached to the order.

To safeguard against this you would be advised to use the Default Delivery Charge in Customer Accounts.

Order Status

The Order Status tab allows you to monitor the status of your orders, both within OSCARnet and after their submission for transfer to you.

Selecting Which Orders to View

Clicking on the order status tab will take you to the following page, where there are a number of ways to select the orders you wish to monitor.

Figure 1 Order Status Tab

Order Monitoring - Microsoft Internet Explorer

Address: <https://secure.test1.secure-op.com/OSCARnet2/design-control/Order-Monitoring.aspx?OrderStatusListType=1>

Customer Account: Show All

ORDER NUMBERS

Order From:

Order To:

ORDER DATES

Date From: 30 April 2008

Date To: 30 May 2008

Items Per Page: 100

Show Results

* means mandatory

Order Number	PO Number	Account	Orderer	Date	OSCARnet Status	Transmiss Status
61	comedine	admin (Ben Manning)	Ben Manning	26 May 2008 16:55	Submitted For Transfer	Sent
60	1234	admin (Ben Manning)	Ben Manning	26 May 2008 16:42	Submitted For Transfer	Sent

Customer Account

This option has a default of 'Show All.' This will show you the status of orders for all your consumers. The drop down list allows you to view the order status for a particular consumer account. The option to select an individual account is only available for accounts who have ordered on the same day that the order status page is viewed.

Order Numbers

Enter the range of order numbers in the 'From' and 'To' boxes to view a selection of orders, and then click the 'Show Results' button to see the orders.

Order Date

Populate the dates to view the orders placed in this timescale, click the 'Show Results' button to see the orders.

Items Per Page

This determines how many orders will populate the screen at any one time. (example - 100) If a result of 500 orders was returned, then OSCARnet will allow you to view page 1, 2 ...up to page 5.

Possible Statuses

The following OSCARnet statuses can be applied to an order:

- Quoted - Held in Recent Quotes
- Cancelled - Deleted Quote
- Awaiting Authorisation
- Submitted For Transfer

Until an order has been submitted for transfer the transmission status will be 'No Status Recorded'. This will change to 'Sent' once the order has been transferred.

Clicking on the order number will display the details of the order.

Returns Approval

On this page you can view all the returns that have been approved.

Figure 1 Returns Approval Tab

You can search by individual Customer Account or 'Show All' accounts.

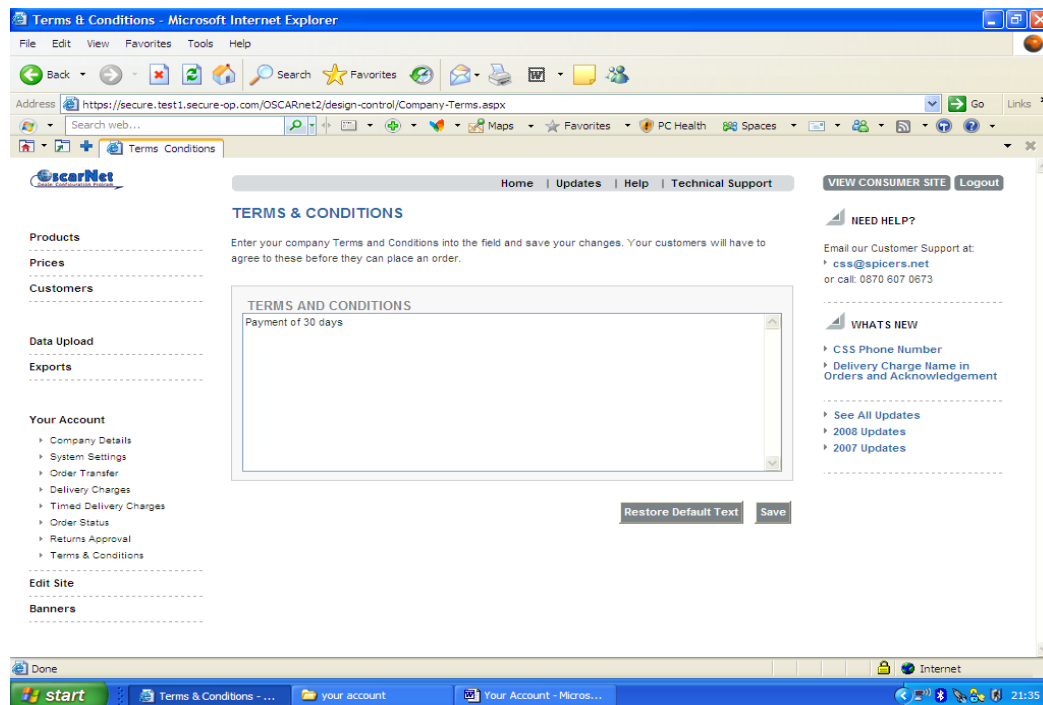
You also have the option to monitor by order number or by order return date.

The functionality on this page is similar in use to the Order Status page.

Terms and Conditions

On this page you can place the terms and conditions that will be displayed to customers both on the front end of your site, and also in the acknowledgement e-mails that get sent to the customer after they place an order.

Figure 1 Terms and Conditions Design-Control



Place in the field the text you wish to display as terms and conditions to your customers. You can, if you wish use HTML tags to format the text, however this will only work when the customers see the terms and conditions on your site. The e-mail will contain plain text, so the HTML tags will show up.

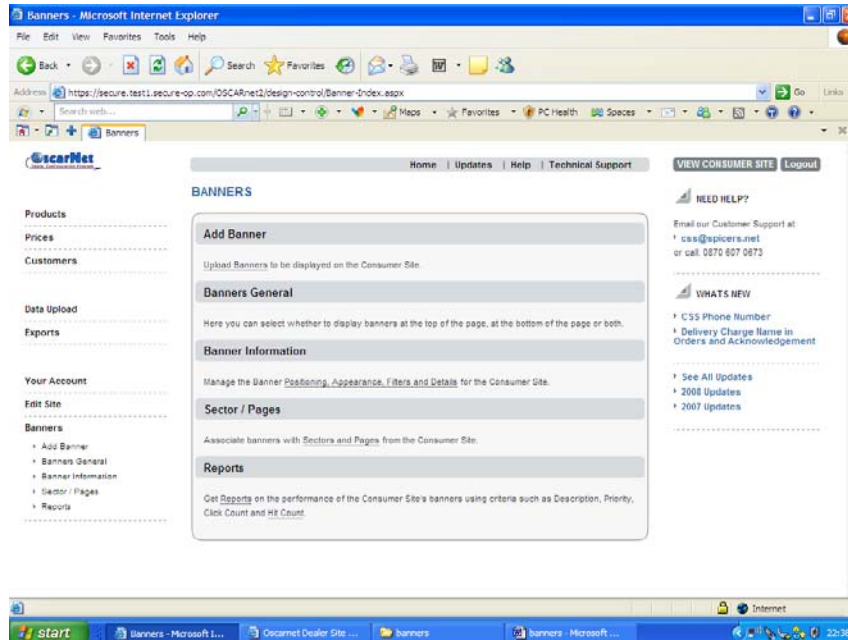
The terms and conditions are displayed on the front end like so:

Figure 4 Terms and Conditions Front End



Banners

Overview



The Banner Maintenance functionality offers you the ability and flexibility to add your own promotional banners to any of the pages on the front of your site.

You will notice there are links within the "banners" section:

- Add banner
- Banners general
- Banner information
- Sectors/Pages
- Reports

The left pane shows a list of all the existing banners for your site (Spicers generated banners are not editable, or displayed in this list). You can narrow the search by using the drop-down box to choose a sector. Only banners applied to this sector will display. (More information on sectors is covered within "Banner Filters"). Select a banner from the list, or create a new banner.

Add Banner

To create a new banner, type the name of the banner and click on "Create new banner".

In this window it will display details of the banner (either the existing one you have selected, or the new one you created). To apply an image, click the "Change Image" button and then click "browse" to choose a file from your PC, and then click on "preview image". The image will be displayed.

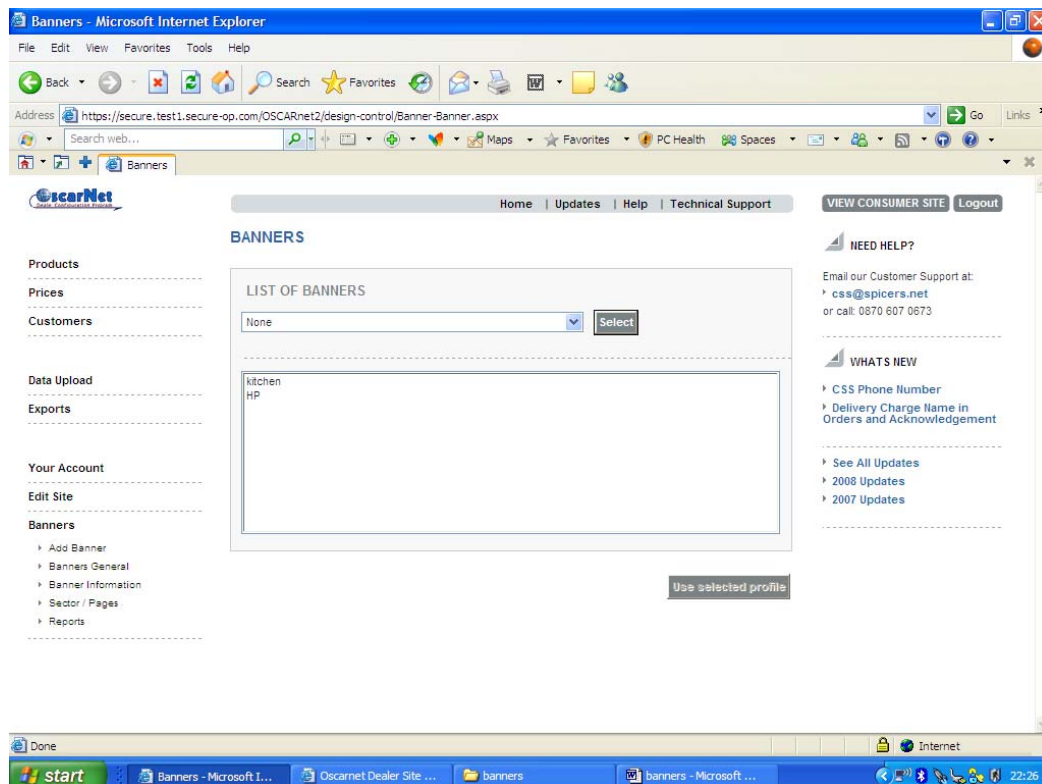
- **Banner Ref** – this is the description displayed in the left pane.
- **Link** – put in here a URL you wish the banner to take a customer to when they click on it.
- **Hint** – while the image loads, and if the customer hovers the mouse over the image, the “hint” is displayed.
- **Open in a New Window** – if this is ticked, the link in “link” will open in a new window, not the current OSCARnet one.
- **Active** – if ticked, the banner will be available to be displayed.
- **Priority** – with multiple banners, it is possible to have one more important than others. If a banner has a priority of 2, it is twice as likely to be displayed as one with a priority of 1.
- **Expiry Date** – after this date, the banner will no longer be “active”. Format is dd/mm/yyyy. This is not a required field.
- **Expiry Hits** – after the banner has been viewed (not clicked on) this number of times; it will not be “active”.

Banners General

Here you can select whether to display banners at the top of the page, the bottom of the page or both. From here you can also view existing banners with the option to choose whether to display them or not.

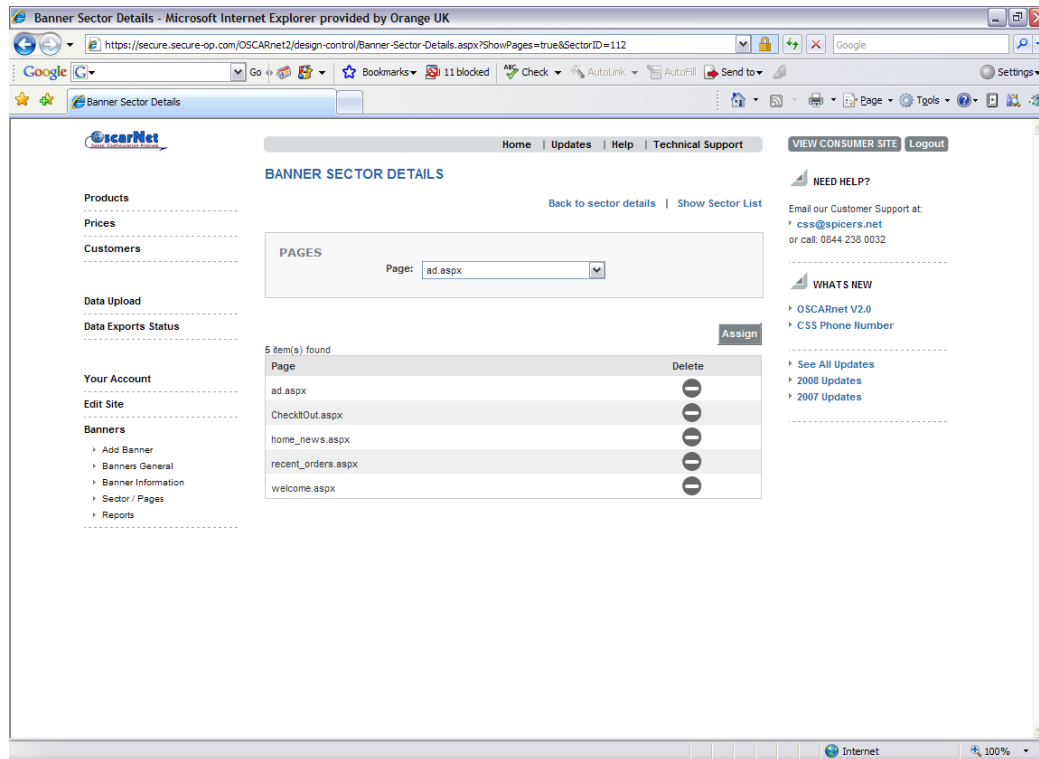
Banner Information

Here you can select an existing banner and edit the details.



Sector Pages

Once a banner is created you can allocate a sector page. A sector is made up of several pages, and when assigned to several banners, all banners will display in the same manner. E.g. If a sector has the check out page, home news and welcome page contained, when assigned to a banner, it will only appear on the pages listed in the sector assigned to it.



Banner Filters can be used to limit the pages that a banner is available on, rather than (possibly) displaying on every page. There are four different ways of doing this:

- **Sectors Link** - the banner can only show on pages within the selected sector(s). More details on sectors in the "Sectors/Pages" section.
- **Pages Link** - the banner can only display on the page selected.
- **Products Link** - the banner can only display on the details page of a particular product.
- **Keywords Link** - the banner will display only on the search results page for certain keywords.

In the case of several filters being applied, the banner can be displayed on any page that meets one of the applied criteria. It is not necessary for it to match all applied filters.

Sector and Page filters have an additional "Sponsorship" setting. This means that this banner will override any non-Sponsorship banner on that sector/page.

Reports

From here you can run reports on the performance of the site's banners using criteria such as description, priority, click count and hit count.

The screenshot shows a web browser window displaying the OscarNet Banner Reports page. The browser's address bar shows the URL: <https://secure.test1.secure-op.com/OSCARnet2/design-control/Banner-Report.aspx>. The page has a navigation bar with links: Home, Updates, Help, Technical Support, VIEW CONSUMER SITE, and Logout. The main content area is titled "BANNER REPORTS" and contains a form for filtering reports. The form includes fields for Start Date (01 May 2008), End Date (31 May 2008), Sector (a dropdown menu), and Page (a dropdown menu). There are "Clear" buttons next to the date fields and a "Show Report" button at the bottom of the form. Below the form is a table with the following data:

Description	Priority	Click Count	Hit Count
kitchen	1	0	131

On the left side of the page, there is a sidebar with links: Products, Prices, Customers, Data Upload, Exports, Your Account, Edit Site, and Banners. The Banners section is expanded, showing links: Add Banner, Banners General, Banner Information, Sector / Pages, and Reports. On the right side, there is a "NEED HELP?" section with contact information for customer support and a "WHAT'S NEW" section with links to CSS Phone Number, Delivery Charge Name in Orders and Acknowledgement, See All Updates, 2008 Updates, and 2007 Updates.

Data Upload

OSCARnet allows you as a dealer to upload information rather than manually enter it all separately. This includes prices, users and products. This will save you time and effort, allowing you to create a large account with much more ease. It will also help you to ensure that the same data is on OSCARnet as on your back office system. It is possible to both add and amend data through uploads.

The Upload Screen

The screenshot shows a web browser window titled "##ScreenName## - Microsoft Internet Explorer". The address bar displays "https://secure.test1.secure-op.com/OSCARnet2/design-control/Generic-Bulk-Upload.aspx". The page features a navigation bar with links: Home, Updates, Help, Technical Support, VIEW CONSUMER SITE, and Logout. A sidebar on the left contains links for Products, Prices, Customers, Data Upload (with sub-links for Upload Status and Outstanding Uploads), Exports, Your Account, Edit Site, and Banners. The main content area is titled "DATA UPLOAD" and includes instructions: "Choose the type of file you would like to upload from the drop-down boxes, then browse to find the file you would like to upload. If you tick 'Ignore Summary', the file will process completely without you having to commit it." The form contains two steps: "1. Select a data category and file type you would like to upload" with dropdown menus for "Select a data category" and "Select a file type", and "2. Select the file you would like to upload" with a "Browse..." button. There are checkboxes for "Urgent upload" and "Ignore Summary" (which is checked). An "Upload File" button is at the bottom right. A "NEED HELP?" section on the right provides contact information for customer support. A "WHAT'S NEW" section lists updates for CSS Phone Number, Delivery Charge Name in Orders and Acknowledgement, and updates for 2007 and 2008. The Windows taskbar at the bottom shows the start button and several open applications, including "Inbox - Microsoft O...", "##ScreenName## ...", "Design-Control - Mi...", and "v2 work". The system clock shows 10:54.

The Upload Process

The first stage in any upload process is to select the relevant upload you wish to action. This will determine what type of data you are going to apply to your site. The screen will look like this

Upload Options

Data Upload - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address <https://secure.test1.secure-op.com/OSCARnet2/design-control/Generic-Bulk-Upload.aspx>

OscarNet

Home | Updates | Help | Technical Support [VIEW CONSUMER SITE](#) [Logout](#)

DATA UPLOAD

Choose the type of file you would like to upload from the drop-down boxes, then browse to find the file you would like to upload. If you tick "Ignore Summary", the file will process completely without you having to commit it.

1. Select a data category and file type you would like to upload

Prices Contract Prices

2. Select the file you would like to upload

Browse...

Urgent upload ☐ Ignore Summary ☒

[Upload File](#)

NEED HELP?

Email our Customer Support at:
css@spicers.net
or call: 0870 607 0673

WHAT'S NEW

- ▶ CSS Phone Number
- ▶ Delivery Charge Name in Orders and Acknowledgement
- ▶ See All Updates
- ▶ 2008 Updates
- ▶ 2007 Updates

Products

Prices

Customers

Data Upload

- ▶ Upload Status
- ▶ Outstanding Uploads

Exports

Your Account

Edit Site

Banners

Done

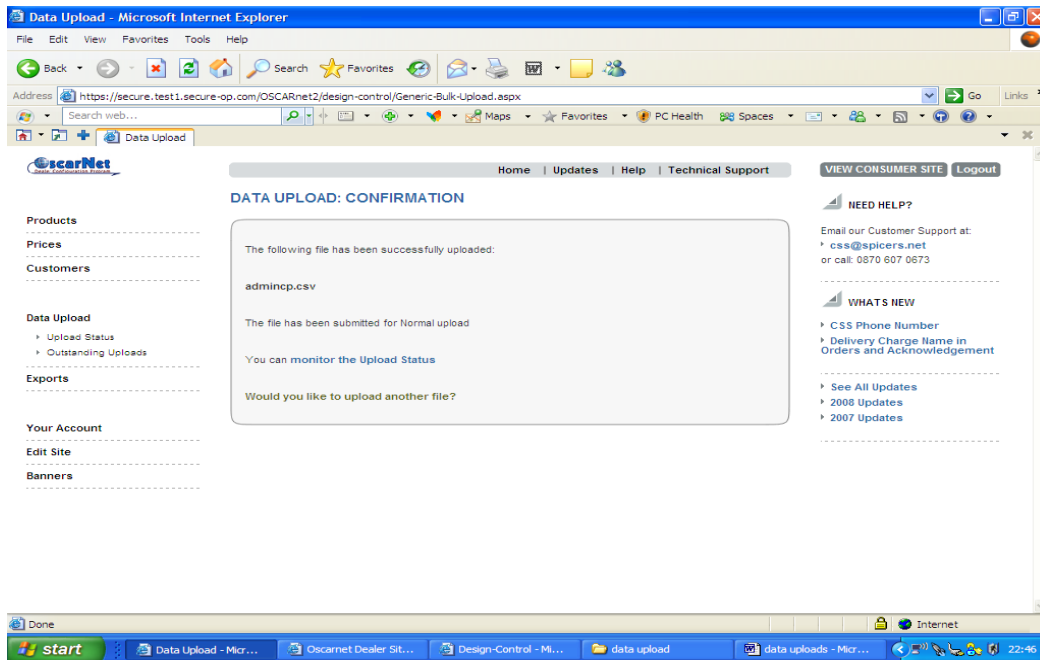
start Data Upload - Micro... OscarNet Dealer Sit... Design-Control - Mic... data upload data uploads - Micro... 22:52

Selecting the File

Use the "Browse" button to navigate to and select the file you have created. It's location and file name will appear in the "Enter Filename" field. If the file is under 100kb in size, you can tick the "Urgent Upload" box, which will increase the priority of the file in queue. The "Ignore Summary" option is ticked by default to make the process quicker. If you wish you can untick it, and you will be shown a summary of the information in the file before it is applied. **To start the upload click on "Upload File"**

If there are any errors they will be displayed here. If there are no problems with the file you have selected, a confirmation message appears:

Upload Successful



Upload Status

Monitoring Uploaded Files

If you click on the hyperlink "monitor the upload Status" button, the following summary is displayed (the most recent file is at the top).

UPLOAD STATUS

Select the type of file below to see the status of all files of that type.

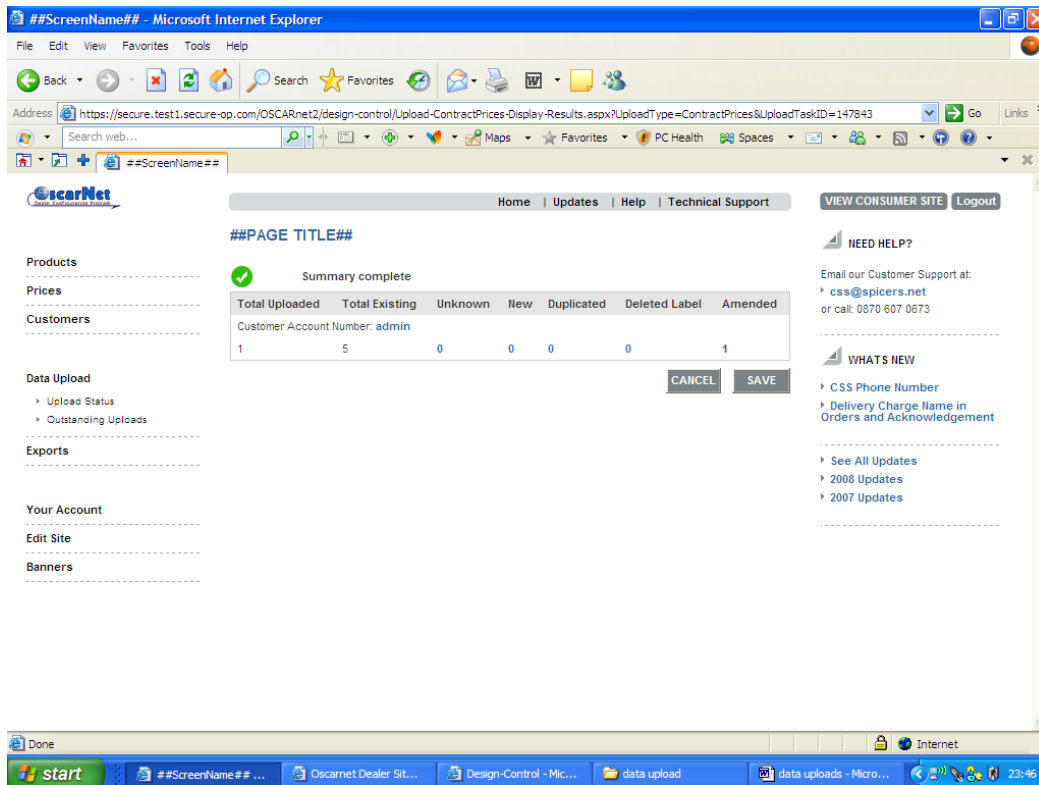
Select a data category and file type
Prices Contract Prices

Filename	Upload type	Size	Date	Status	Progress
admincp.csv	Contract-Pricing	19 B	30/05/2008 23:20:09	Done	1 of 1
admincp.csv	Contract-Pricing	19 B	30/05/2008 23:20:09	Done	1 of 1
admincp.csv	Contract-Pricing	19 B	30/05/2008 23:20:08	Done	1 of 1
Book1.csv	Contract-Pricing	41 B	26/05/2008 23:20:07	Done	1 of 1
admincp.csv	Contract-Pricing	38 B	19/05/2008 23:20:05	Done	1 of 1
admincp.csv	Contract-Pricing	20 B	19/05/2008 23:20:04	Done	1 of 1

If you have left the "Ignore Summary" box *ticked* then the file will progress steadily to a status of "Done", at which point the changes contained within it will have been applied. You can watch this process on the screen, but it is not necessary - OSCARnet will continue to process the file even if you close the browser.

The Summary and Committing Files

If you unticked the "Ignore Summary" box, the file will progress to a status of "Awaiting Commit", which will be a hyperlink. When you click on the "Awaiting Commit" link a summary of the file will be displayed:



Once you have perused the information in the summary, you can choose to Cancel or Save the file. If you click on "Cancel" the file will be discarded, click on "Save" and the file will go through a process of "Committing" to a status of "Done", at which point all changes have been made permanent. The "Tax Band" option is specific only to product uploads.

Please note: The creation of a summary will make the upload take more time and therefore we recommend you leave "Ignore Summary" ticked.

Outstanding Uploads

In here it will list all of the upload files currently waiting to be committed.

Upload Delays

At busy times, OSCARnet will process upload files more slowly. This is to maximise the performance of the Front End of OSCARnet, so that your customers get the best possible experience. Ticking the "Urgent Upload" option (for small files) will speed up the process as the file will have a higher priority in the queue. Uploading outside of peak hours (9am to 5pm Monday-Friday) will also increase the speed at which the file is applied. Remember, to avoid delays you can upload a file in the evening, and leave it to run overnight.

Product Upload Modification

OSCARnet now gives you the ability to upload more product information than previously.

All of the previous product upload headings will still need to be used, but the following five columns have been added:

Image File(product.jpg or product.gif)
Specific Information
Bullet Point Text
Keywords
New Product Flag

As well as adding these five fields to the end of the product upload file, you can now upload products using a simple .xls or csv file.

In the Design-Control section, under 'Upload Files' there will be a 'Product Upload' template. This template is specific to your site and takes into account the settings that are available.

Please note that it's only the product file that can be uploaded as a .xls file as well as a csv. All other uploads must be done with a .csv file.

File Formats

All upload files have to be comma-separated files. This means that commas separate the data content and the file will have a file extension of .csv. Files created using Microsoft Excel can be saved as .csv files as can text files. Please note the formats below should be considered continuous lines, i.e. no carriage returns and no spaces before or after the commas.

Product Upload File Format

ProductCode,ProductDescription,Pack,Per,Price,PricingBandLetter,Discontinued(Y/N),Bespoke(Y/N),BOSSF,[Weight],[Dimensions],VAT
Rate%, [EnvironmentallyFriendlyProduct(Y/N)], [EnvironmentallyFriendlyDetails], imagefile(product.jpg or product.gif), specificinformation, bulletpointtext, keywords, newproductsflag

Additional Catalogue Product Upload File Format

ProductCode,ProductDescription,Pack,Per,Price,PricingBandLetter,Discontinued(Y/N),Bespoke(Y/N),BOSSF,[Weight],[Dimensions],CatalogueName,VAT
Rate%, [EnvironmentallyFriendlyProduct(Y/N)], [EnvironmentallyFriendlyDetails], Priority, PictureFile, ProductBulletPointtext, GroupsBulletText, Keywords, NewProduct, ProductCatalogueType

Addresses Upload File Format

CustomerAccountNumber,AddressLine 1,AddressLine 2,AddressLine
3,AddressLine4,AddressLine 5,
PostCode,AddressPhone,DealerAddressRef,LEAVE
AS0,AddressFax,AddressComments1,AddressComments2, include for all users (Y/N)

Cost Centre Upload File Format

CustomerAccountNumber,CostCentreRef,CostCentreName, include for all users (Y/N)

User Upload File Format

CustomerAccountNumber, SurName, ForeName, [Title], [Phone], [Extension], [Fax], [Mobile], Email, DeliveryAddressRef, [JobTitle], CostCentreRef, InvoiceAddressRef, [PermissionGroup], [username], [password], AccountActiveFlag (Y/N or 1/0), AuthorisationRequestsEmailFlag (Y/N or 1/0), [MinimumOrderValue(Number)], [MaximumOrderValue(NUmber)], [MaximumLineValue(Number)], LineValueExceededAction (Block, Warn or Authorisation), OrderValueExceededAction (Block, Warn or Authorization) AuthoriseBudgetFlag (Y/N or 1/0), BudgetReport (No, All or CostCentres), RestrictOrderingToReqPadFlag (Y/N or 1/0), [AuthorisationRestrictionCatalogue (catalogue name)], [OrderRestrictionCatalogue (catalogue name)], [ViewRestrictionCatalogue (catalogue name)] [] = optional, include for all users (Y/N)

Code Conversion Upload File Format

TargetCode, InputCode, Y/N (Add or delete a conversion)

Customer Code Conversion Upload File Format

Customer Account Number, Product Code, Alias Code, Y/N (add or delete a conversion)

Contract Pricing Upload File Format

Customer Account Number, Product Code, Pack Size, ContractPrice

Template Upload File Format

CustomerAccountNumber, [TemplateName], Product Code, [Header] [] = if required, include for all users (Y/N), Add/Remove flag (Y/N)

Mini Catalogue Upload File Format

Mini Catalogue Name, Product Code, Add/Remove flag (Y/N)

Price Catalogue Upload File Format

Price Catalogue Name, Product Code, Price, Add/Remove flag (Y/N)

Cost Centre Budgets Upload File Format

Consumer Account, CostCentre Ref, Budget, Start Date, End Date

Bespoke Product Upload File Format

Customer Account Number, Productcode, Bespokeflag (Y/N)

Cost Centre Addresses Upload File Format

Consumer account number, Cost centre reference, Address reference

Alternative Products Upload File Format

Product Code,Alternative Product Code,Y/N (Where Y is to add the alternative and N is to remove it)

Product Linking Upload File Format

OriginalCode,LinkedCode,OwnBrandAlternative[Y/N],ProprietaryAlternative[Y/N],BiggerPack[Y/N],SmallerPack[Y/N],DifferentColour[Y/N],HigherQuality[Y/N],LowerQuality[Y/N],Complement[Y/N],SameRange[Y/N]

Quantity Breaks Upload File Format

Dealer Quantity Breaks = DealerProductCode, BreakType,[price or percent],qty1,pricebreak1,qty2, pricebreak2 [up to 5 quantities]

Customer Quantity Breaks = AccountNumber, ProductCode, BreakType, [price or percent],qty1, pricebreak1, qty2, pricebreak 2 [up to 5 quantities]

Special Offers Upload File Format

ProductCode,SpecialCode,Price,StartDate[DD/MM/YYYY],EndDate[DD/MM/YYYY],OverrideContractPrice[Y or N],OverridePriceCatalogue[Y or N],OverrideDiscountExceptions[Y or N].

Stock Data

Code, Quantity

Edit Site

Basic changes to the way your OSCARnet site "looks and feels" are applied from this Tab. Screen colours, fonts and appearances can be changed with great ease from the drop down facilities. These options will update your consumer's view of OSCARnet even if they are currently on line.

There are seven links within the edit site tab. These are "Layout", "Colours and Fonts", "Images and Graphics", "Navigation Menu" and "Summary / Advanced Settings". Initially, the display will appear as follows:

Figure 1 Look and Feel

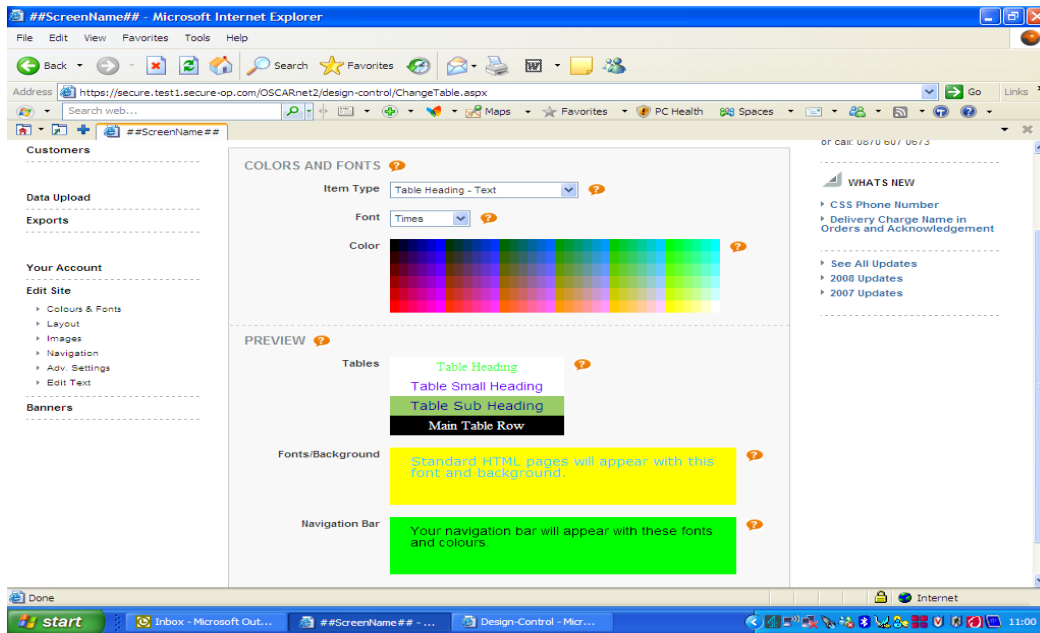
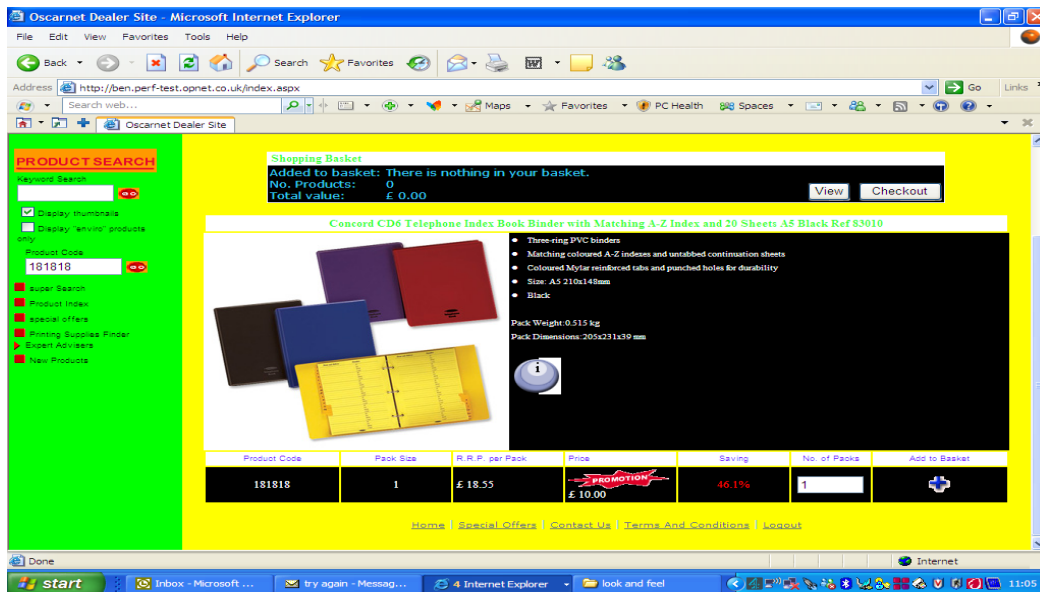
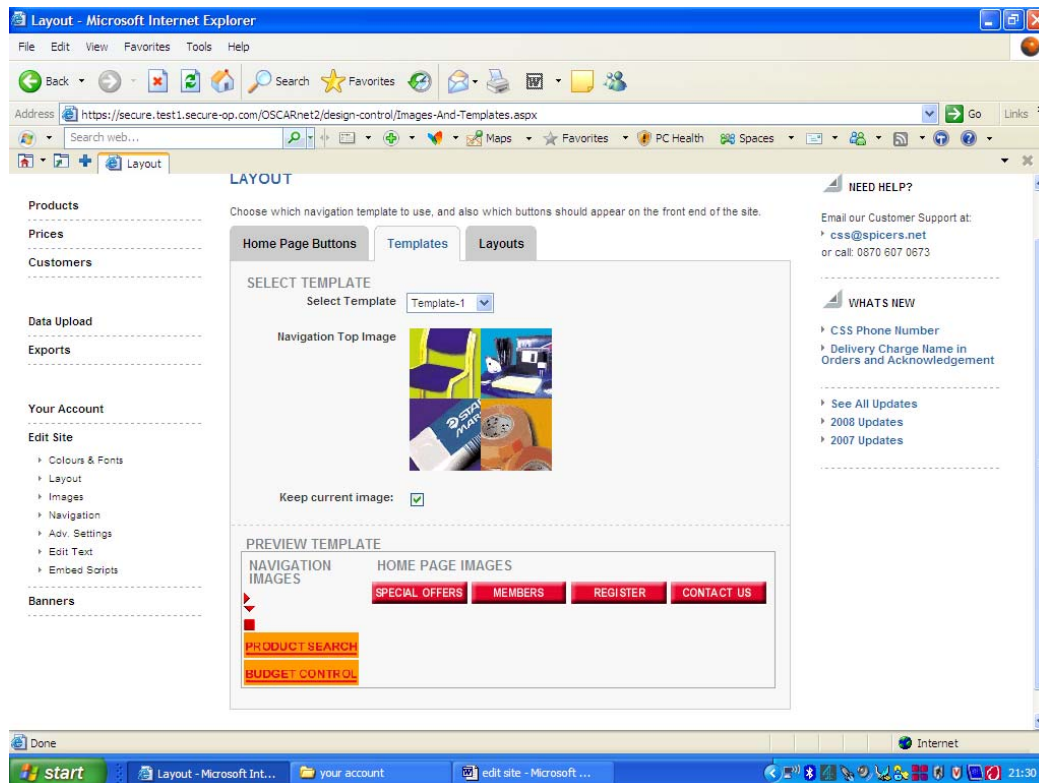


Figure 2 Corresponding front End



Layout



The Layout Property Tab allows further customisation of the way your site looks. A number of templates have been set up based on Spicers catalogue covers. At the top of the screen the default, "Template 1" is shown. Selecting the down arrow to the right of this displays the list of Templates available.

The Templates determine the images used in two areas. These are the Home Page Images and the Navigation Images. A Home Page is the first page that your customers will see when logging on. The Home Page Images therefore are basically the bullet pictures. Navigation images are those that appear in the Navigation Bar.

If an image has already been uploaded to the Navigation bar then you are offered the option of a) Using the current image or b) Replacing it with the Template image.

You also have the option of which "Home Page Buttons" you wish to display. Selecting and de-selecting each button controls its availability to all of your Customers.

! THIS will change colour settings!

Colours and Fonts

This Property changes the basic display of your site. At any point, enter the "View Site" to show the current settings. The page is split up into different sections, some of which can be tailored using the options provided.

Item Type

This lists the various sections that can be changed. Click on the drop down arrow and select a section. You can then select the font and colour of the option you've selected.

Font

This enables the font type to be selected for your site. It is likely that your customers may be using many different types of Internet browser. Therefore, the font selection has been limited to those that are applicable to all browser types. This ensures that your customer will be able to see all text clearly.

The font types are...

- Arial
- Times
- Verdana
- Helvetica
- Sans-Serif

Simply click on the down arrow and select from the list. This will change the section you have chosen from the item type.

Colour Palette

Once you have selected your preferred font, you can then choose a colour for the txt or background, depending on which item type you've selected.

You will then be able to preview it in the preview section below.

Save/Options

When you are happy with the colour and font selections, click the SAVE button to upload the changes made to your site. At this point, any customer entering OSCARnet will see the new colour schemes.

Restoring the previous colour scheme

- This is only necessary if a new colour scheme has been saved.
- To revert to the **previously saved** colour/font scheme, click the RESET button.

Restoring the previous Template

See Section Layout. The default colour scheme is Template 1; selecting this therefore restores the default.

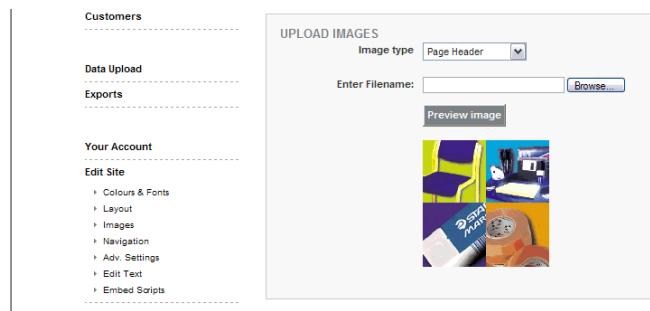
Images

How to add your company name image

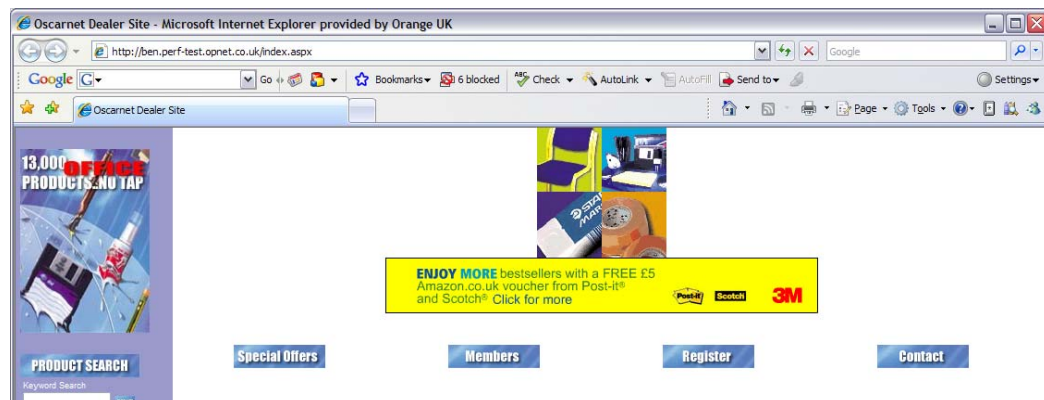
1. Using the down arrow select an Image Type. Page header will image will appear in the centre of the screen and the Navigation header image will appear on the top left hand side of the navigation bar of the front page.

This will show the currently active image.

2. Enter the new image name into the "Filename" box. If this name is unknown, the "Browse" button can be used. The drives and the directories of the PC can then be explored to determine the location of the image.
3. Once the file name has been entered or located, select the PREVIEW IMAGE button, to get a preview before upload.



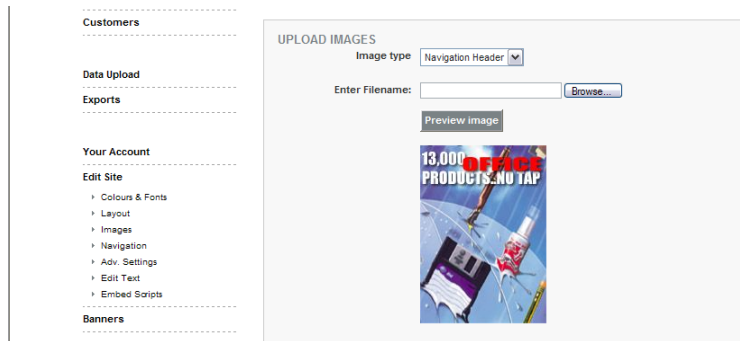
Once you click 'Save' the new image will now be live to your customers, and can be viewed by clicking on CONSUMER VIEW SITE on the top right of the screen.



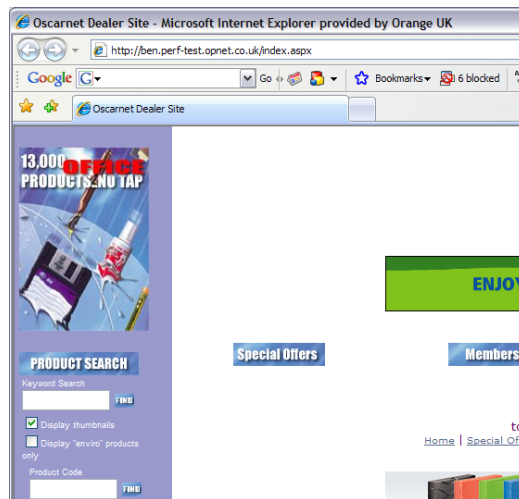
How to add your company logo or graphic

On image type, using the down arrow, select Navigation Header. This will show the currently active image.

Enter the new image name into the "Filename" box or use "Browse."



Once the file name has been entered or located, select the PREVIEW IMAGE button, to get a preview of the image before upload.

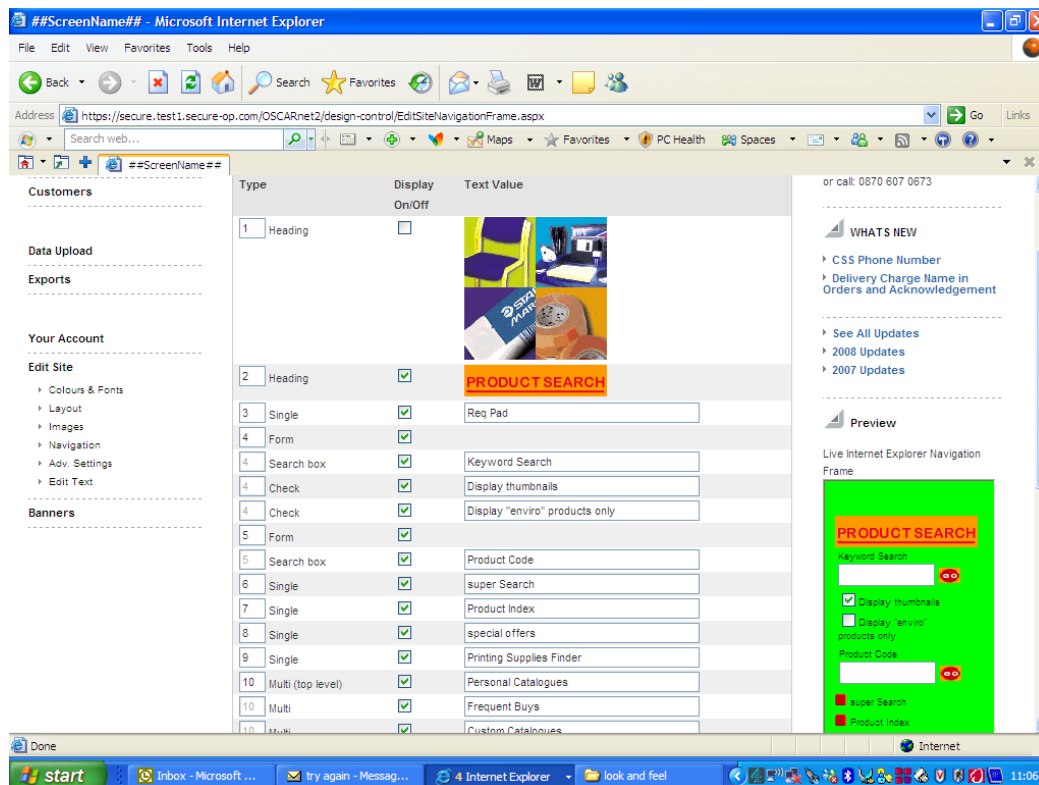


Once you click 'Save' the new image will now be live to your customers, and can be viewed by clicking on CONSUMER VIEW SITE on the top right of the screen.

Navigation Bar

This option allows you to customise the options that appear in the Navigation Bar. Take the following example:

Figure 3 Navigation Bar Customisation



The numbers in the left-hand column, "Type", indicate the position of an option within the bar. Therefore setting Product Index to "3" and "Req. Pad" to "6" would simply swap the two options around.

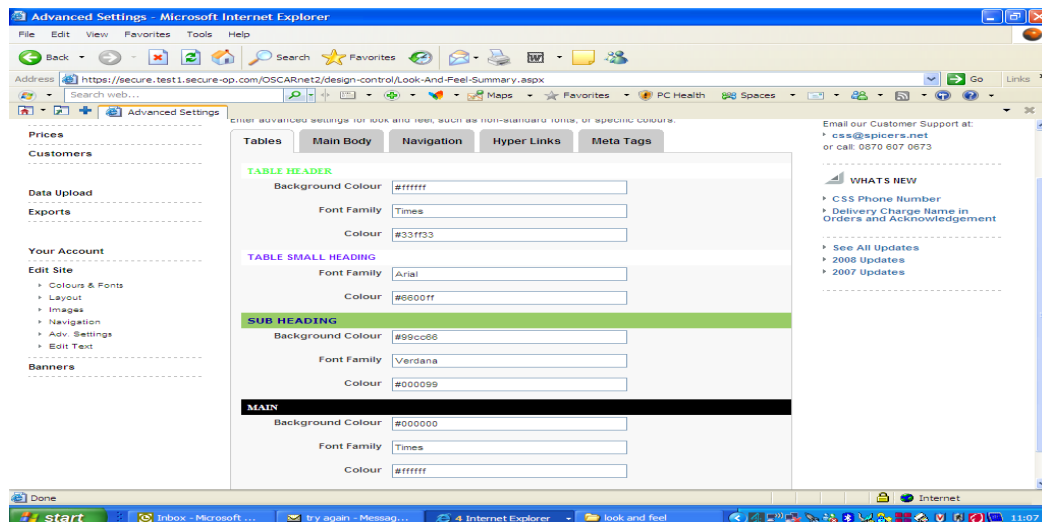
The "Display On/Off" flag indicates which options are available.

The "Text Value" Column allows for the names of each option to be edited.

Once the Bar has been customised, selecting the "Save" button will save your selection. The Bar on the right hand side of the screen will then refresh to show how your customers currently view it. 'Reset' will change it all back to the default settings.

Advanced Settings

Colours can have an html number assigned to them. These can be used if a colour is required that is not available in the palette. Therefore, for an exact colour match, simply enter the corresponding numbers and characters in the relevant box. This may appear as follows:



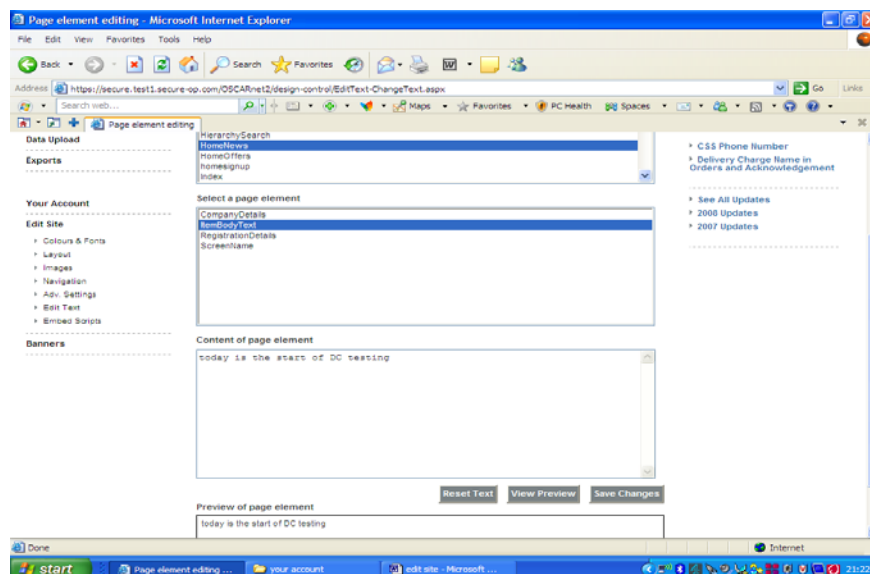
Meta Tags

If you choose to register with search engines, Meta tags are sometimes used in order to determine what exactly a site does. Insert up to FIVE key words.

Edit Text

As well as being able to customise the colours and graphics of your OSCARnet site, it is also possible to change the text that is displayed on various pages. The pages are: -

- Home News
- Contact Us
- Index Page
- Welcome page
- Order Acknowledgment



How Do I Edit My Home Page?

- Select the page called 'HomeNews'.
- Then select the page element called 'itembodytext'
- Input the information you wish to display in the 'content of page element section'
- This will then display in the 'preview of page element'
- Upon completion, click the 'Save Changes' button to update your site. These changes will now be live.

As well as plain text, HTML can be used to include additional features such as

- Providing links to other Web pages
- Providing 'Hot-Links' for e-mail
- Pulling in graphics from other Web pages

Spicers do not support HTML authoring. Should you wish to perform such actions, it is up to you to find the in-house knowledge of how to do so.

When you have made the changes that you wish to make to your site and want to view the appearance then click on the "view consumer site".

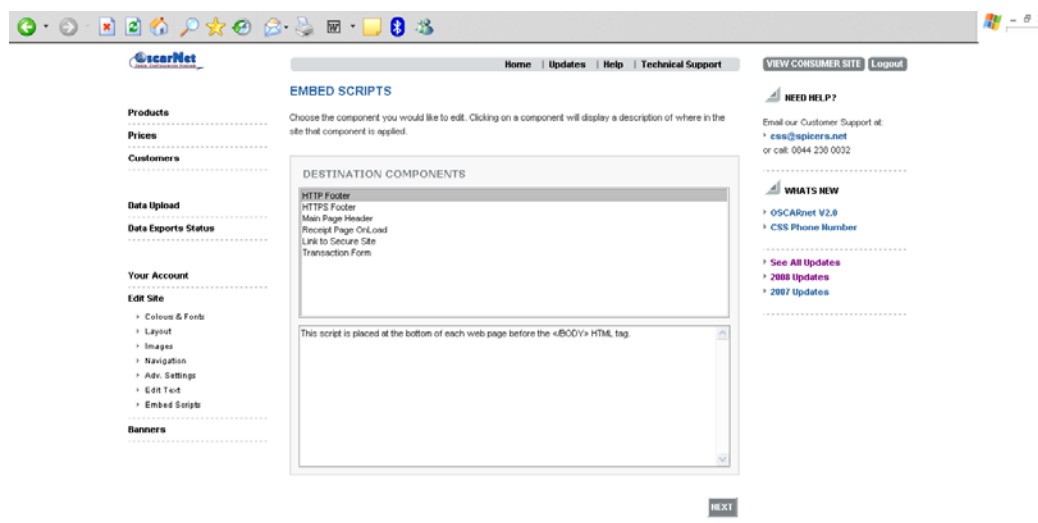
This will open up your OSCARnet site in a separate window for your viewing.

Embed Scripts

These are basically, website tracking text.

It allows you to put a script with tracking tags into certain pages of OSCARnet. It can then collate the data for you or display banners for advertisements. If information is being collated it can help you to improve the content and design of your site.

Firstly select where you would like to place the tracking script. It will tell you in the bottom screen where the actual script will sit on the front end of your site.



Once the destination has been selected, click next.

EMBED SCRIPTS

[Back to destination components](#)

Enter the details of the script you would like to embed, using the Available Variables if required.

AVAILABLE VARIABLES

Site URL

SCRIPT SNIPPET

```
<script src="http://www.google-analytics.com/urchin.js" type="text/javascript">
</script>
<script>
  _uacct="UA-xxxx-x";
  _udn="[site url]";
  urchinTracker();
</script>
```

Save

It will then give you the tag you need to enter into the script snippet. Then click Save. It will now track the activity on the url given.

Data Exports Status

The export section allows you to download reports in .csv format from OSCARnet. There are various reports available including Products, Customer Accounts and Contract Pricing.

You can view multiple exports or select the export type from the drop down box.

The screenshot shows the 'Data Export - Microsoft Internet Explorer' window. The address bar displays <https://secure.test1.secure-op.com/OSCARnet2/design-control/Export-Status.aspx>. The page title is 'DATA EXPORT'. On the left, there is a sidebar with links: Products, Prices, Customers, Data Upload, Exports, Your Account, Edit Site, and Banners. The main content area has a 'Select the export type:' dropdown menu with 'All exports' selected. Below this, there is an 'InstructionText - Export Download' section with a table of export records.

Export type	Additional info	Date	Status	Action
Products	All dealer products	19/05/2008 20:31:48	No data	
Contract Pricing	All Contract Pricing	19/05/2008 20:23:07	Done	Download
Customer Accounts	All dealer accounts	19/05/2008 20:23:04	Done	Download
Contract Pricing	account: admin	19/05/2008 20:15:33	Done	Download

On the right side of the page, there is a 'NEED HELP?' section with contact information for customer support and a 'WHAT'S NEW' section with links to CSS Phone Number, Delivery Charge Name in Orders and Acknowledgement, See All Updates, 2008 Updates, and 2007 Updates.

Once you have clicked on the link it will then give you the option to open or save the file. This will export as a csv file.

Products

OSCARnet has the flexibility to allow you to build your own product database. In this section, products can be added, maintained and even bespoke to certain accounts. Special offers and discount breaks are also set here giving the option to provide for pricing incentives should you wish.

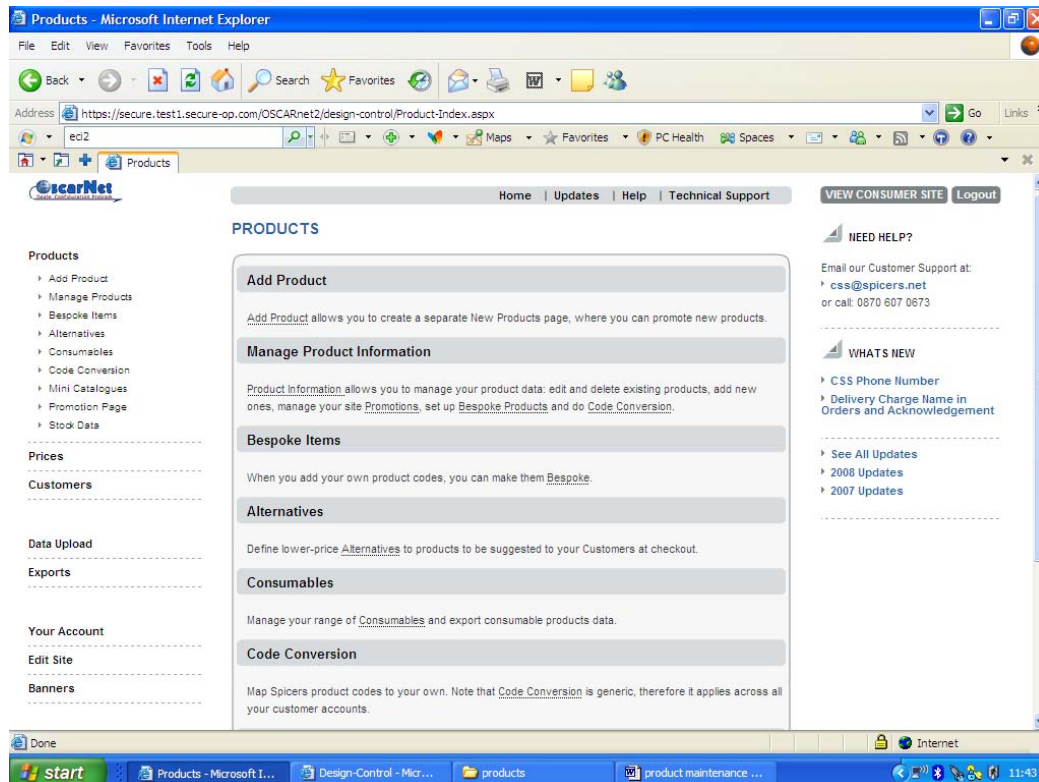


Image Size Restrictions

OSCARnet will now have the ability to restrict the sizes of images that are uploaded. This leads to improved upload times and improves user's experience of OSCARnet.

There are two different limits, one for product images and one for all other images

The limit for product images will be 80kb per image. If a file larger than this is being uploaded then you will receive an error message stating that this limit is in place.

All other images on your OSCARnet site, for example Look and Feel images, Consumer Logo images, Banner images, and Design Editor images have been limited to 250kb per image. This again will create an error message if anything over this limit is attempted

Add Product – Mandatory Fields

Enter the product code you are creating (up to 15 characters) along with its description (up to 105 characters).

Enter the relevant BOSS code and the product will automatically appear within the index (BOSS Class = position in the index). You can also use the drop down lists of BOSS classifications to populate this field automatically.

Unit Frame

Enter the pack and per for this product. The VAT code needs to be set for each product.

Selling Price

The retail price for this code should be entered here.

Bands

The pricing band letter is only applicable if pricing using that method. The other two options here are the 'Discontinued' option and the 'Bespoke' option. Checking the 'Discontinued' flag stops a product being available for sale. Checking the 'New' box will simply show a 'New' flag next to the product when it is viewed on your site.

Then click on "Add New Item" to save details

Optional Fields

Specific Information can be used to add specific text to a product, for example information on lead times. This text will be displayed separately from the bullet text.

To add an image for a product click the browse button near the *Product Image* label to select a file. Image files can be in .jpg or .gif format. To preview the image you have selected click the Preview button. You can remove an image at any time by clicking the Remove button.

To add bulleted texts for a product, type it into the box next to the label. You will be able to see the bullet points on your site once you have saved the text.

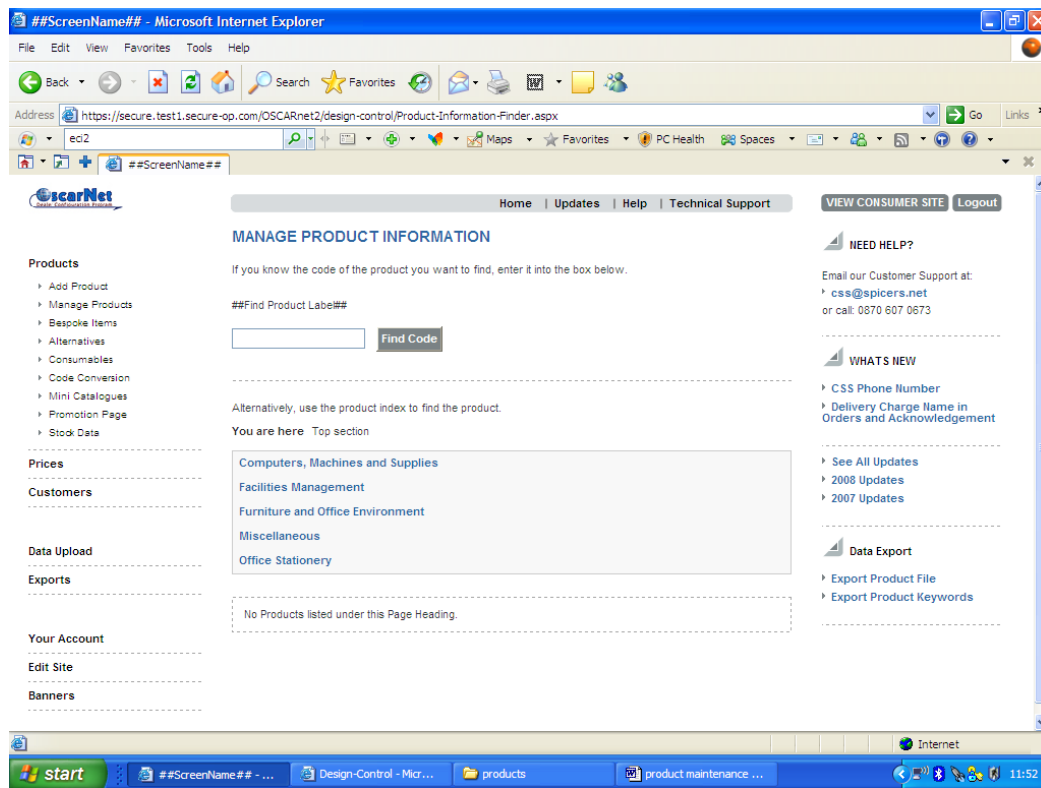
To save time when adding or editing products a 'Copy image and text from' facility has been included on this screen. To copy the image and text from another product, type in the product code you wish to copy from and save the product. If you then edit the image or text for either product, changes will not be reflected in the other.

Extra Information

This allows you to enter some additional information for your reference only. This will not be displayed to the customer.

Manage Products

Once you have created your product code, you have the option to go back into the details and edit the information. This can be done in Manage Products. You can Search for your products by BOSS Class Index or Key Word Search



Bespoke Items

When adding your own product codes you can make them 'Bespoke'. This means that they are not available to every customer using OSCARnet. This tab allows you to specify exactly which consumers do have access to bespoke products.

Step 1

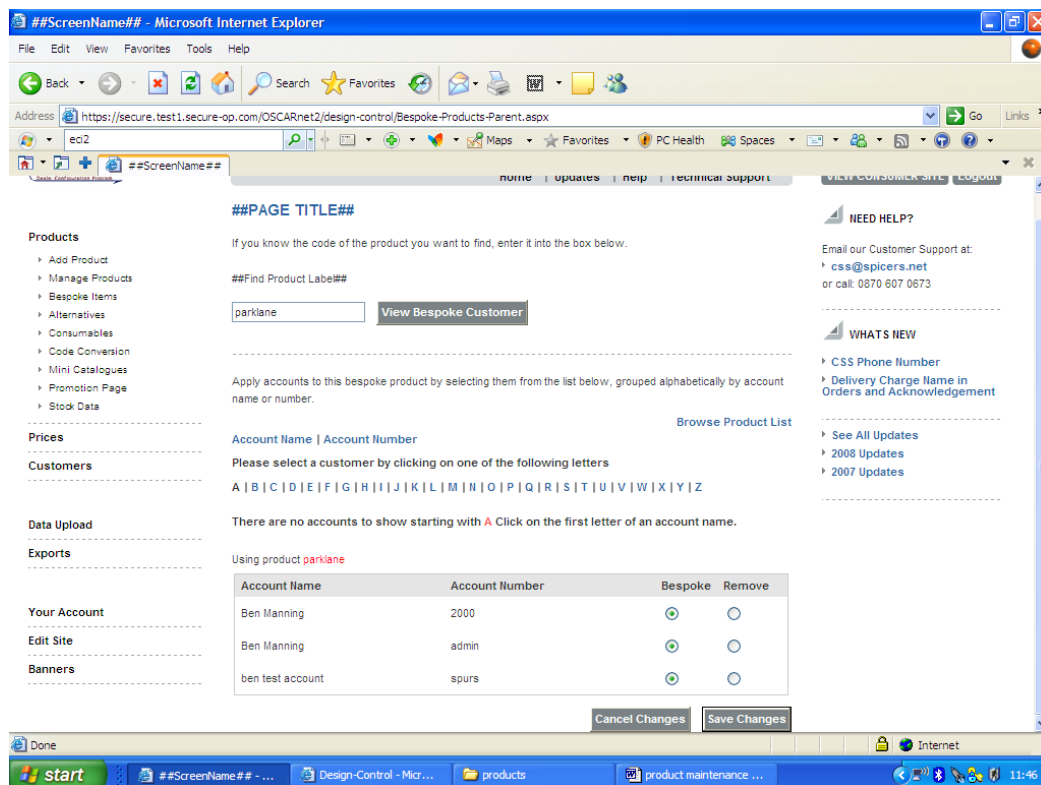
Search for the bespoke product you wish to assign to some accounts.

Step 2

Select from the alphabetical list, the first letter of the account you wish to assign this product to. Alternatively you can search for the account by account name or number. The drop down list will then display all your consumer accounts that begin with that letter, as shown.

Step 3

After selecting an account, press the 'Select' button to the right of the drop down menu. The bottom of this window will now be populated with the Chosen account.



Repeat this process until you have selected all the accounts that you wish to view this product code. **Selecting 'Save Changes' then allows the selected accounts (ONLY) to view this product.**

The 'Remove' checkbox allows you to remove any accounts that you no longer wish to view this product. **Again, remember to save the changes.**

Alternatives

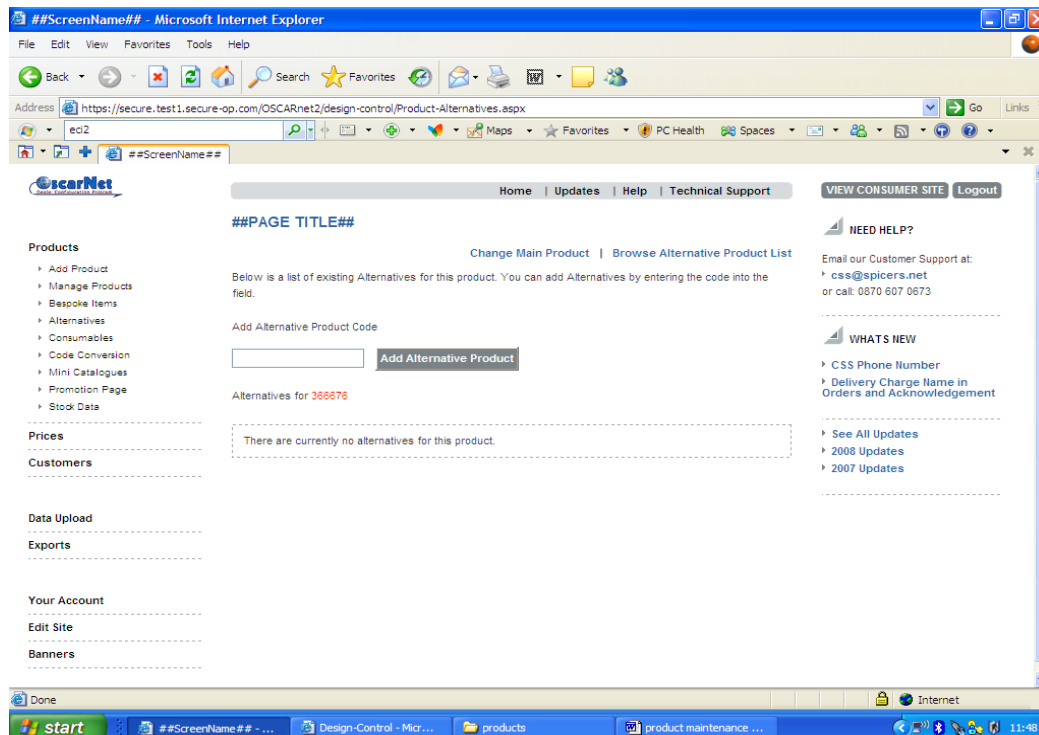
This tab allows you to set up a range of similar alternative products to offer consumers when they add a product to their shopping basket. When the user adds the item they will be offered any available alternative products which have a lower price, and given the option to substitute any of these for the product they have chosen.

In the 'Customer Maintenance' tab, under 'Customer Accounts', you can select which accounts and/or users will be able to view suggested alternatives.

Manually Adding Alternative Products

In the central pane enter the product code that you want to offer alternatives on, and click the 'Select Product' button. Once a product has been selected, enter alternative products using the 'Add product' option on the top left of the screen. A list of alternatives can be created. To remove an alternative product click the minus symbol button next to the alternative product.

Alternatives



Alternative products can also be uploaded in bulk, see the upload files section of this manual.

Consumables

In this section you can add your own non-Spicers consumables to the printer and consumables finder.

The product code will have to be created first in 'Add Product' Enter the code in the 'find code box'

You can then allocate a Machine Manufacturer, Machine Type and a Machine Name using the drop down options.

OscarNet

Home | Updates | Help | Technical Support

CONSUMABLES

If you know the code of the product you want to find, enter it into the box below.

Enter Code Here

w004959 Find Code ☒ Show intermediate page

Apply this product to a business machine by selecting the machine manufacturer, type and name from the drop down boxes.

[Browse Product List](#)

PRODUCT CODE: **w004959**

CONSUMABLE MACHINE DETAILS

Machine Manufacturer: HP

Machine Type: Inkjet Printer

Machine Name: Designjet 100plus

CONSUMABLE TYPE

☒ Manufacturer

☐ Compatible

Save

Under 'Consumable Type' you can choose whether this product is a manufacturers' or compatible product, this will determine where it appears once the code has been found in the search. If the 'Show intermediate page' is ticked then when a search for a product is returned, and you click the 'Show compatibles' button, a message will appear before it proceeds to that page telling you the compatible consumables are not produced by the manufacturer of your machine.

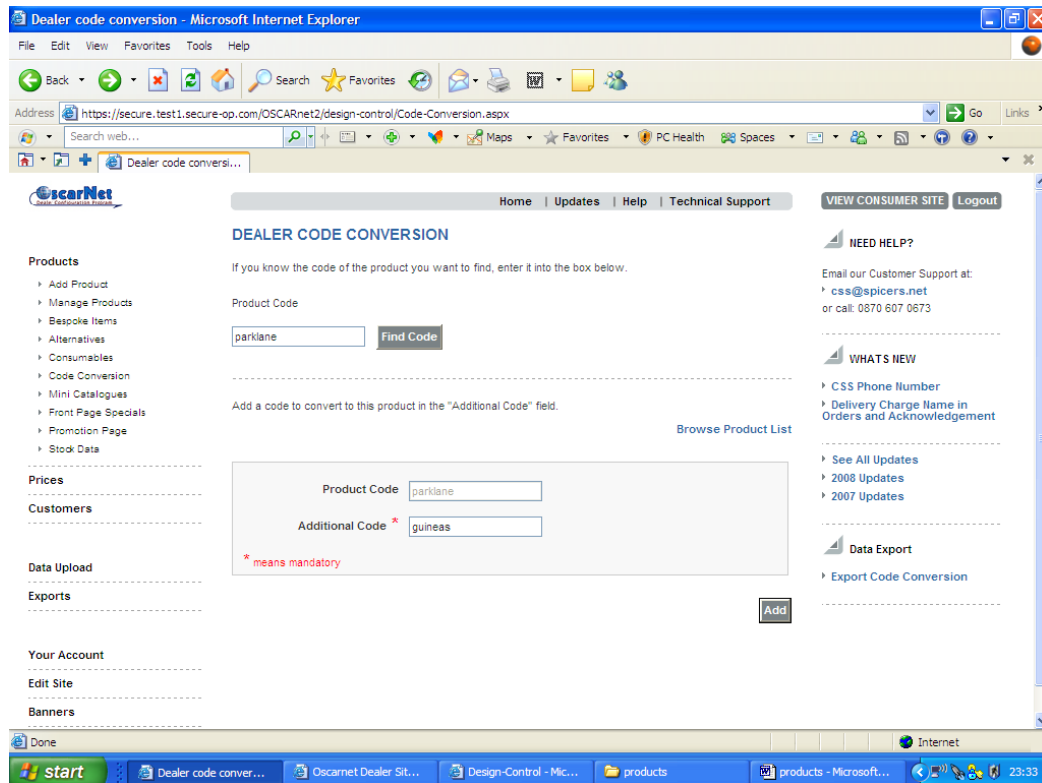
Code Conversion

ALL CODE CONVERSIONS ARE GENERIC i.e. THEY AFFECT ALL ACCOUNTS.

Code Conversion

In the 'find code' box, type in the code you wish to convert. In the additional code box type in the conversion code, then click 'ADD'

When the additional code is typed in on the front end, it will appear with all of the details of the product e.g. image, description etc. except the actual product code.

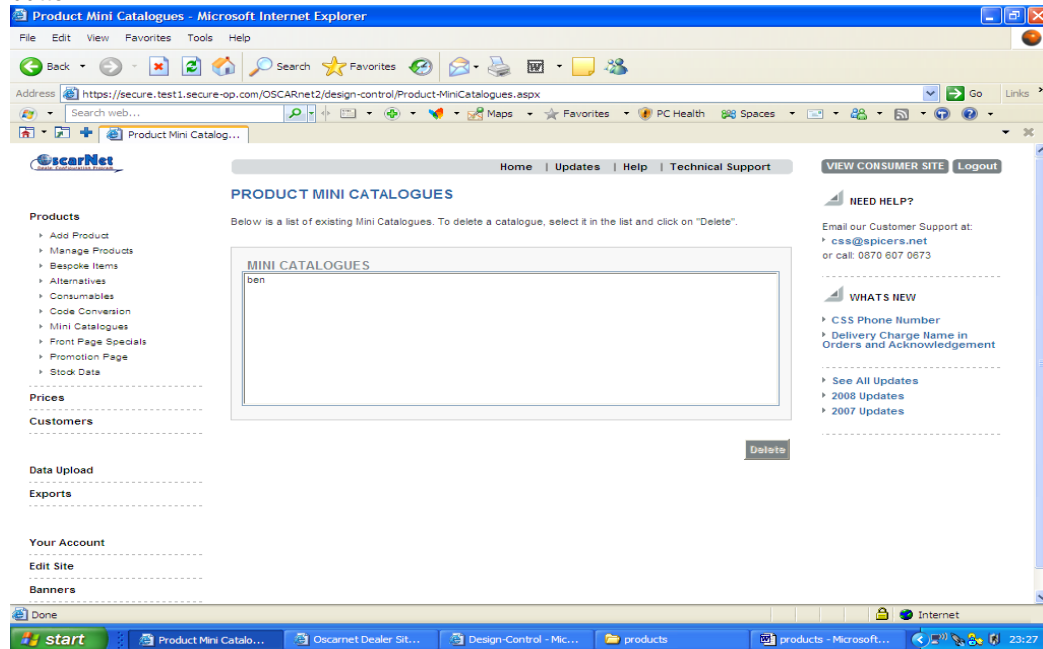


Exporting Code Conversions

To export all your code conversions click the link to the right side of the page. This will give you a list of all code conversions applied to the whole OSCARnet site. This file will be ready in the exports section of design-control it will be in the same format as a Code Conversion upload file would be.

Mini Catalogues

This section will allow you to delete any mini catalogues you have created. Highlight the catalogue you wish to remove and then click on the delete button



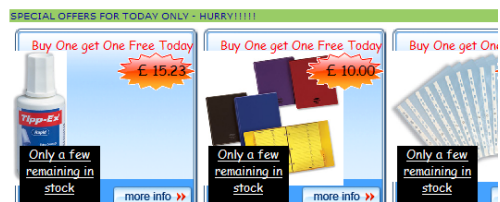
Front Page Specials

This section allows you to create special offers that will be viewed on the front page.

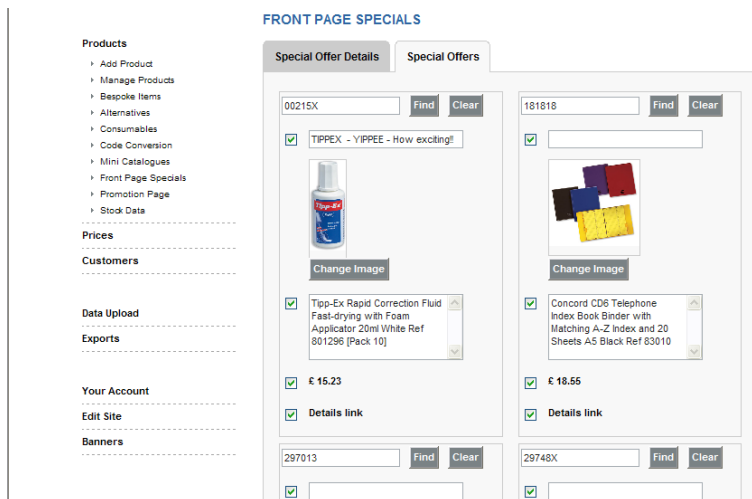
The screenshot shows a web application interface for managing front page specials. On the left is a sidebar menu with categories: Products (Add Product, Manage Products, Bespoke Items, Alternatives, Consumables, Code Conversion, Mini Catalogues, Front Page Specials, Promotion Page, Stock Data), Prices, Customers, Data Upload, Exports, Your Account, Edit Site, and Banners. The main area is titled 'FRONT PAGE SPECIALS' and has two tabs: 'Special Offer Details' and 'Special Offers'. The 'Special Offer Details' tab is active, showing a 'SPECIAL OFFER TEMPLATE' section with a 'Selected Template' dropdown set to 'mugs' and a 'Start Design Editor' button. Below this is a preview of a 'Buy One get One Free Today' offer for mugs, priced at £14.00, with a 'more info' link. At the bottom is a 'FRONT PAGE SPECIALS SETTINGS' section with a 'Header Catch Line' text area containing 'Buy your colour mugs today' and a 'Show Spicers Promotion' checkbox that is checked.

Once you've clicked on 'design editor', on the 'Special offer details' tab, it will take you into another page where you can change the font colour and size, edit text and link the image to an outside url if you wish. Once you've saved the image you can give it a template name, then apply it to the site using 'Select Template'

'Header Catch Line' – this text will appear on the bar above the special offers.



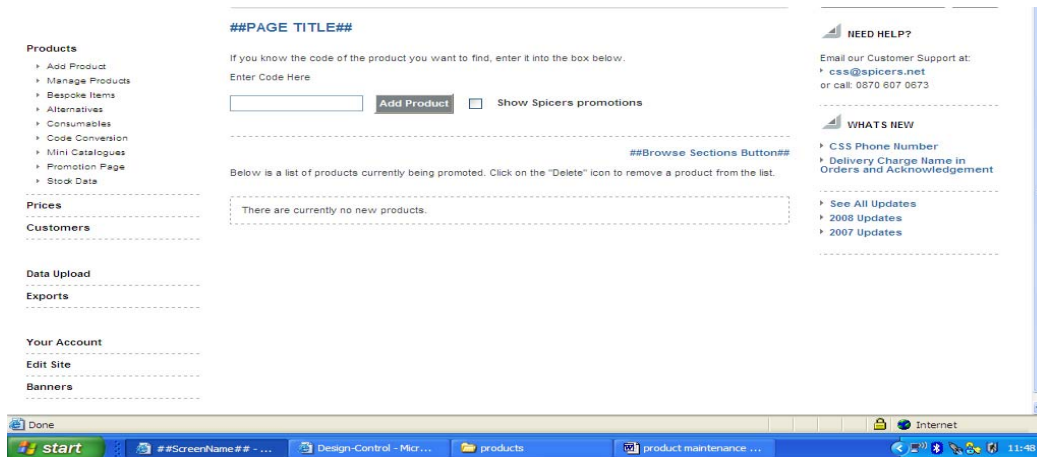
You can have a maximum of 8 front page specials showing at one time. These can be created in the 'Special Offers' tab, by simply typing in the product code. It will populate the image and description of the product. You can choose to upload your own picture, or have the image linked to the product detail.



New Products

This tab is used to select new products to promote to your customers. It looks like this:

New Products



To add products, enter the code in the field on the left of the screen and click on "Add Product". You can remove products from the list by clicking on the minus sign to the right of the product.

Show Spicers New Products - Spicers Ltd E-Content department select some new products to promote. If you tick this box, they will also be displayed to your customer. If you untick the box, only the products in the list on the right will be displayed.

For the promotion to be displayed on the front end, it is necessary to tick the "New Products" box at the bottom of the Navigation Menu. This can be found under the "Edit Site" link and then "Navigation". You can also change the text "New Products" to whatever you would like to be displayed to your customers.

Navigation Menu

Now on the front end of the site, there will be a new option in the Navigation Bar. This is by default called "New Products", but if you changed the text above, it will be displayed as you have modified it. When the customer clicks on the link, the products are displayed with small images.

Promotions Front End

New Products


0 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58 59 60 61 62 63 64 65 66 67 68 69 70 71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99

Sorry - we don't have a picture for this product yet.

Pufferfish
Price: £ 3.39



Merit Computer Flexi Copyholder Capacity 50mm A4 and Folio Cap Ref 35790X CCS
Price: £ 30.80




Merit Computer CD Tower Capacity 20 Discs 14x125x320mm Grey Ref CCS22280
Price: £ 6.20



Computer Monitor Screen Panel 6.7mm Stackable 1 Drawer 315x228x74mm Grey Ref CCS2306
Price: £ 8.49



Computer Desktop USB Hub USB 2.0 480Mbps 12x73.4x15.9mm Graphite Ref CCS10310
Price: £ 33.99



Computer 30DVD Storage Rack Adjustable 200-460x160x225mm Graphite Ref CCS22297
Price: £ 7.64



Computer Computer Microphone with Plug 3.5mm -80dB/1kHz 200Hz-10kHz Ref CCS30300
Price: £ 8.49



Computer Deluxe Multimedia Headset Headphone 3m Cord Ref CCS5221
Price: £ 16.99

Stock Data

Enter your product code that you wish to set a stock level for (dealer codes only) Set the quantity in the quantity field and then set quantity. This information can also be uploaded. Please see data upload section for upload and file format.

Stock Data - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://secure.test1.secure-ep.com/OSCARnet12/design-control/stock_data

Search with...

Stock Data

Home | Updates | Help | Technical Support

VIEW CONSUMER SITE Logout

NEED HELP?

Email our Customer Support at:
* css@spicers.net
or call 0870 607 0673

WHAT'S NEW

- * CSS Phone Number
- * Delivery Charge Name in Orders and Acknowledgement
- * See All Updates
- * 2008 Updates
- * 2007 Updates

Data Export

- * Export Stock Data

Products

- * Add Product
- * Manage Products
- * Bespoke Items
- * Alternatives
- * Consumables
- * Case Conversion
- * Mini Catalogues
- * Front Page Specials
- * Promotion Page
- * Stock Data

Prices

Customers

Data Upload

Exports

Your Account

Edit Site

Banners

STOCK DATA

If you know the code of the product you want to find, enter it into the box below.

Enter the product code

Enter your stock level for this product into the "Quantity" field below.

Product Code: parklane

Quantity *

* means mandatory

Done

start

Stock Data - Microsof...

OSCARnet Dealer Site...

products

products - Microsoft ...

Internet

23:02